



| WEALTH MANAGEMENT |

Wealth Management Online—User Guide Two Factor Authentication (2FA)

Sign into Wealth Management Statements

Complete the Registration for TEXT

- The Two Factor Authentication Setup screen appears with the option to register your number for TEXT or Voice. TEXT is the default selection.


- Click **Continue**

Register My Mobile Number

Mobile Number	+1 USA ▼	<input type="text" value="Mobile number"/>
Confirm Mobile Number	+1 USA ▼	<input type="text" value="Re-enter mobile number"/>

- Enter the mobile number and confirm your mobile number. Country code default is USA.
- Click **Proceed** to continue to **Register My Mobile Number**

Complete Mobile Number Registration

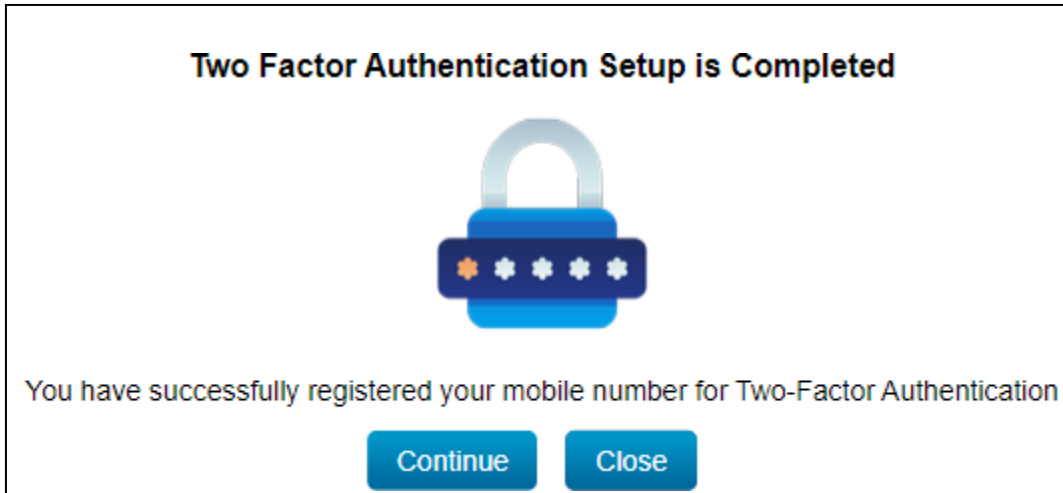


Please enter the 6-digit passcode sent to your registered mobile number. It will be valid for 20 minutes.

[Resend Passcode](#)

- A 6-digit passcode is generated and sent as a Text (SMS) message to the number entered.
- Input the 6-digit passcode to **Complete Mobile Number Registration**.
- Click **Proceed**. The passcode is valid for 20 minutes after it is generated. If needed, click **Resend Passcode** to get a new passcode.

- You have successfully registered your mobile number - **Two Factor Authentication Setup** is Completed.
- Click **Continue** to proceed to the application.




Two Factor Authentication is required at every login after entering your Login ID and Password by entering the 6-digit passcode sent to your registered number.

Complete the Registration for VOICE

To complete the Voice option, select **VOICE** (it does not show your registered number partially displayed), you will be prompted to register a number.

Two Factor Authentication

How do you want to receive the passcode?



Select an Option

TEXT
(*****2389)

VOICE


- Click **Continue**

Register My Voice Call Number

Phone Number	+1 USA ▼	Phone number
Confirm Phone Number	+1 USA ▼	Re-enter phone number

- Enter the number and confirm the number. Country code default is USA.
- Click **Proceed** to continue to **Register My Voice Call Number**

Complete Number Registration



Please enter the 6-digit passcode sent to your registered number. It will be valid for 20 minutes.


[Resend Passcode](#)

- A 6-digit passcode is generated and sent by an automated phone message to the number entered.
- Input the 6-digit passcode to **Complete Number Registration**.
- Click **Proceed**. The passcode is valid for 20 minutes after it is generated. If needed, click **Resend Passcode** to get a new passcode.

You have successfully registered your number for– **Two Factor Authentication Setup is Completed**.

- Click **Continue** to proceed to the application.

Two Factor Authentication Setup is Completed



You have successfully registered your number for Two-Factor Authentication

Two Factor Authentication is required at every login after entering your Login ID and Password by entering the 6-digit passcode sent to your registered number.

Update 2FA Phone Number – User

Log in and click **My Profile** located on the upper right.

- To update your 2FA TEXT or VOICE phone number simply input the new number and Click **SAVE** – and a confirmation message is displayed.

The screenshot shows the 'MY PROFILE' page with a confirmation message: 'Your profile has been updated.' Below this, there are sections for 'Login Information', 'Email', 'Text', and 'Voice'. The 'Text' and 'Voice' sections each have a dropdown menu for the country code (set to '+1 USA') and a text input field for the phone number. Red arrows point to these input fields. The 'Text' field contains '5462062389' and the 'Voice' field contains '7326326161'. The 'Email' section shows 'lschreiner@f-tek.com' and a checked 'NOTIFICATION' checkbox.

Select Statement to complete E-Consent

Click Statement to begin the eConsent needed to obtain eStatements.

The screenshot shows the 'BROADWAY BANK WEALTH MANAGEMENT ONLINE' page. At the top, it displays 'WEALTH MANAGEMENT ONLINE - 09/22/2021', 'ACCOUNT: Select An Account', and 'DATE: 09/21/2021'. Below this is a navigation bar with 'REPORT' and 'STATEMENT' dropdown menus. The main content area features a green 'WELCOME...' banner followed by a message: 'Welcome to Broadway Bank Wealth Management Online. You can view your Account Balances and Statements Electronically and Securely over the Internet. For assistance please call 210-283-6700. IMPORTANT UPDATES: Beginning July 13, 2021 you will be prompted with an additional verification step prior to viewing your e-Statements. This is a one-time verification. Once completed, you will not be prompted again. On April 26, 2021 an additional layer of security called a two-factor authentication will be implemented when you sign into your account. This change will add a second verification step to the sign in process. To learn more and download the step-by-step guide [click here](#).' The page has a red header bar and a light gray background.

Complete Step 1: select Click here to view a PDF sample statement.

REPORT STATEMENT CONSOLIDATIONS

My Statements

Entry of the confirmation code below is confirmation of your consent to receive e-statements and your ability to view those statements. Please follow the consent and verification steps below.

Step 1: [Click here to view a PDF sample statement](#)

Step 2: Get a confirmation code in the sample statement

Step 3: Enter the confirmation code in the below field

Consent/Confirm

Note: If you are unable to view the sample statement, please follow the below steps:

1. Download and install the Free Adobe Acrobat Reader from <http://www.adobe.com/products/acrobat/readstep2.html>
2. Close all browser windows then open a browser.
3. Log in to TrustReporter and go to: Statements, View/Download

If you have previously completed the verification process then one or more of the following may apply:

1. This is the first time accessing it from this device.
2. You have re-installed your computer's operation system on this device.
3. You have disabled or deleted cookies in your browser.

Step 2: You will receive a confirmation code.

Welcome to TrustReporter ca.trustreporter.com

File Edit Go to Favorites Help

Convert Select

Share Browser Webex

Pages - Identification Pages - The Hub (2) WM Online Admin Login-B... Pages - Wealth Management Pages - The Hub

Your device is able to display statements

Your Confirmation Code: 8224

Step 3: Enter the confirmation code in the appropriate text box. Select **Consent/Confirm**.

REPORT STATEMENT CONSOLIDATIONS

My Statements

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