INSURED DEPOSIT PORTAL

# Client Portal User Guide

Insured Deposit Portal
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# Using IDP's Client Portal

Here at the Insured Deposit Portal, we want your experience to be as seamless as possible. To that end, we have created a secure, online client portal so that you can both initiate transactions and check your statement easily and on your own time. This manual will outline how to use the online portal.

## How Can I Access the Client Portal?

You can access the IDP Client Portal in several ways:

- **By email.** As an IDP client, you will receive an email when a new statement or new document becomes available. To access the statement or document, simply click on the link provided in the email to access the client login.

- **Through the IDP website.** There is a link to the client portal through our website at www.insured-deposit-portal.com. Choose "Client Portal" from the top menu. Then click "Client Login" to access the login page, as shown below.

- **By creating a bookmark.** You can access the IDP client portal at any time by opening your browser to the IDP client portal address https://insured-deposit-portal.com/portal/login-page/. You may want to bookmark this page for future use.

## How Do I Create a User Name and Password?

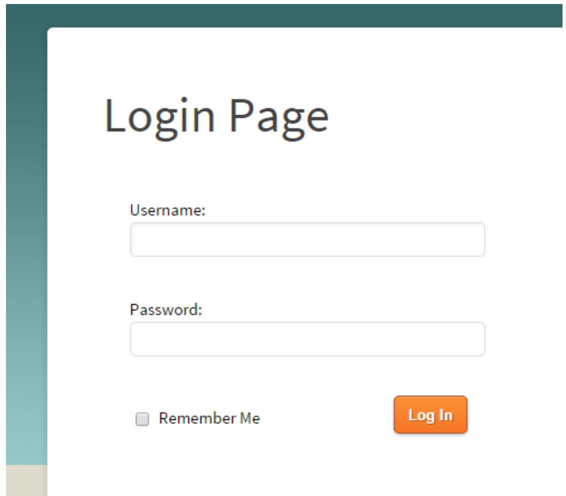
At this time, there is no way to independently create a username and password for the IDP Client Portal. Instead, usernames are created when the account is created and emailed to all authorized traders. To create a new user, an organization must submit a letter of instruction on company letterhead, signed by an authorized trader, indicating that a new user may be added to the account. At that time, a username and password for the new user will be sent using the name and email provided in the letter. Please contact IDP if you have any questions about adding users to your account.

### Usernames

Each user will have a unique user name provided by IDP staff. Please keep this username secure as it allows access to all functions on the Client Portal.

## How Do I Log Into my Client Portal?

Using the steps provided above, access the client login page. Using the username and password provided to you by IDP staff, complete the login form. Click "Log In".



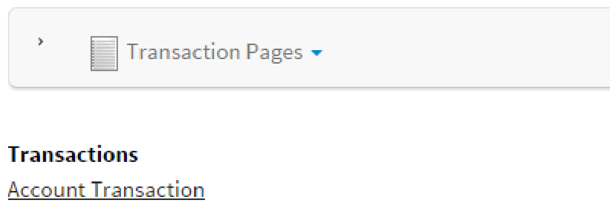

### What if I Have Lost My Username or Password

If you have forgotten or lost your username or password, you may click the "Lost your password?" link.


If you have lost your username, enter your email. Otherwise, you may enter either your username or the corresponding email to process this request. This link will send you an email that contains a link to reset your password. Your user name will be listed in the email in the salutation. When resetting your password, the password must pass the strength test in order to be accepted. To create a strong password, use letters, numbers and symbols and avoid using recognizable words or dates.

# How Do I Make a Transaction?

After logging into the Client Portal, you need to access the Account Transaction page. In order to access the page, click "Account Transaction" under the "Transaction Pages" drop down.



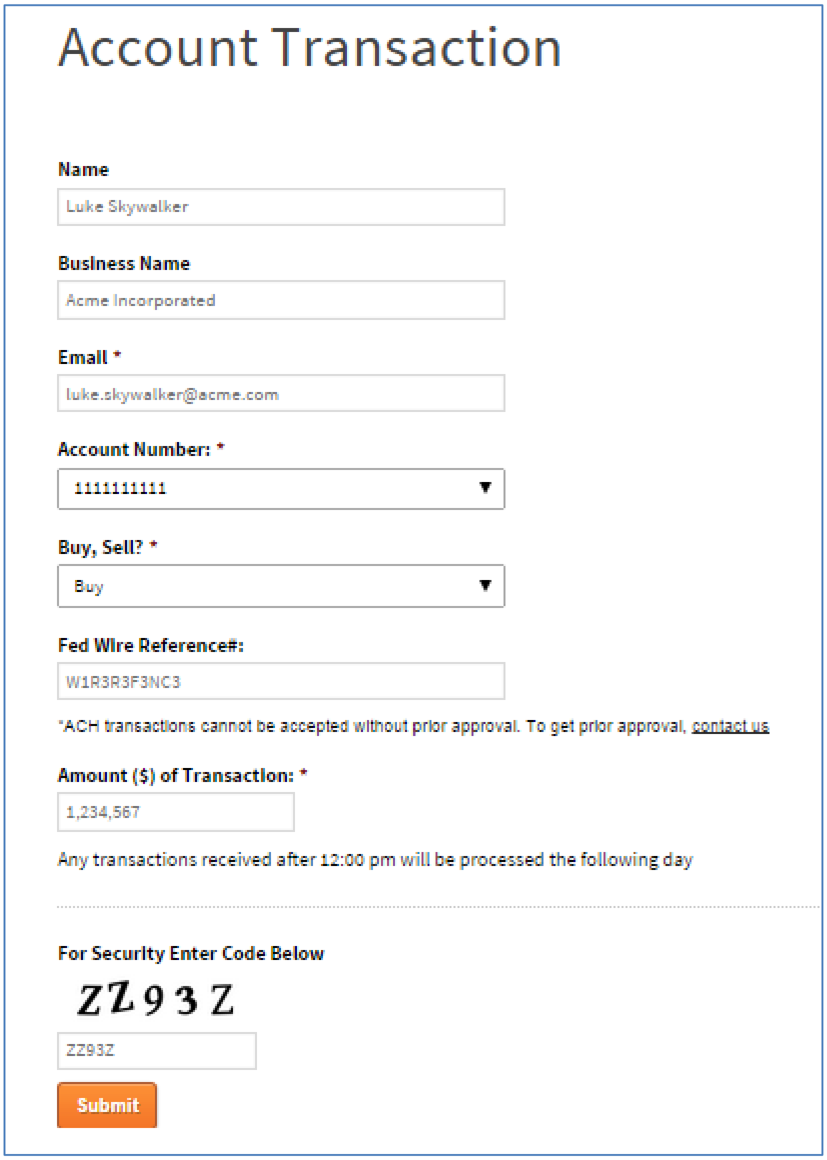

Choosing that link will bring you to the Account Transaction page from which all transactions, purchases and redemptions, are recorded.

## Making a Purchase

To make a purchase, first complete the appropriate wire transaction to fund the purchase. You can find the wire instructions under the Client Portal link by clicking on "Wire Instructions".

After processing the wire transaction, follow these steps on the Account Transaction page to record your purchase:

1. Confirm that your name, business name and email are entered correctly.
2. Select the Account Number for which you would like to process the transaction from the drop down menu.
3. Select "Buy" from the drop down menu.
4. When you select "Buy," an additional item will appear requesting the Federal Wire Reference number. Please enter the confirmation number of the wire transaction provided by your bank.
5. Enter the amount of the transaction.
6. Type the required Security Code in the box below the code.
7. Click "Submit."



# Account Transaction

**Name**

Luke Skywalker

**Business Name**

Acme Incorporated

**Email** *

luke.skywalker@acme.com

**Account Number:** *

1111111111

**Buy, Sell?** *

Buy

**Fed Wire Reference#:**

W1R3R3F3NC3

*ACH transactions cannot be accepted without prior approval. To get prior approval, contact us

**Amount ($) of Transaction:** *

1,234,567

Any transactions received after 12:00 pm will be processed the following day

**For Security Enter Code Below**

ZZ93Z

ZZ93Z

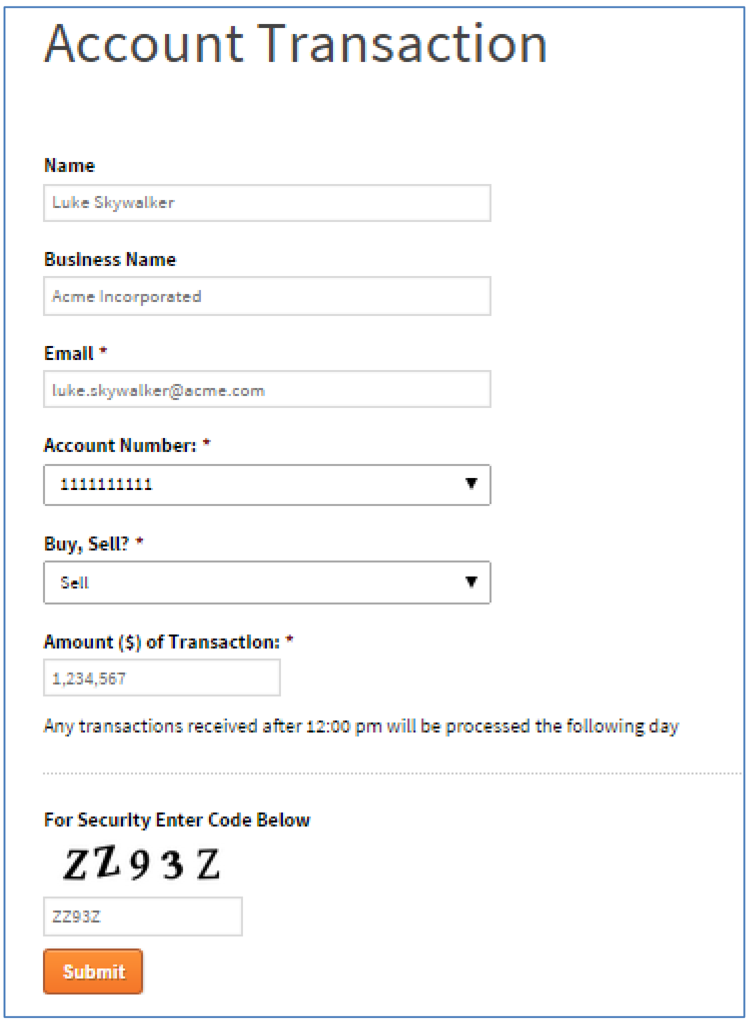
**Submit**

After you click submit, you will see a confirmation screen. Also, an email will be sent to your account which includes all the details of the completed transaction.

### Making a Redemption

To make a redemption, follow these steps on the Account Transaction page to record your redemption:

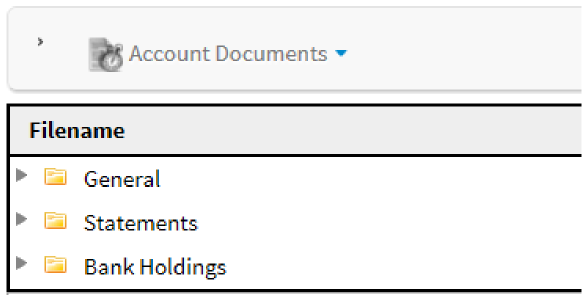
1. Confirm that your name, business name and email are entered correctly.
2. Select the Account Number for which you would like to process the transaction from the drop down menu.
3. Select "Sell" from the drop down menu. To sell all shares, click "Sell All" from drop down menu.
4. Enter the amount of the transaction.
5. Type the required Security Code into the box below.
6. Click "Submit."




After you click submit, you will see a confirmation screen. Also, an email will be sent to your account which includes all the details of the completed transaction.

# How Do I View My Statements?

Each month, you will receive an email informing you that a new statement has been uploaded to your Client Portal. All statements are loaded in PDF format. To access your statements, log in to the Client Portal. You will find all your statements, and other documents related to your account, in the "Account Documents" drop down menu.




### How to Open a Document

Click on the appropriate header: General, Statements or Bank Holdings .Click on the document you would like to open. Your browser should automatically open the document and begin to download. Depending on your browser, you may be asked if you would like to open or save the file. You may do either depending on your intended use.

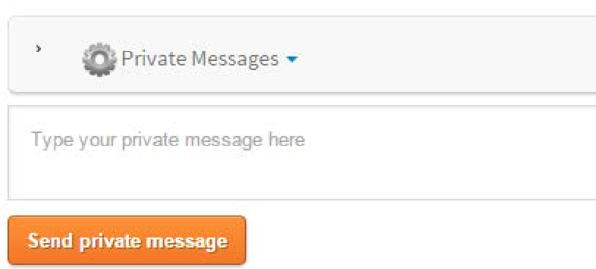
### How to Print a Document

To print a document, download it as described above. From there, click CTRL + P to print from the Adobe Reader.

# How Do I Send a Message to IDP?

Communicating with IDP through the web couldn't be easier. First, you can always send a message directly to info@insured-deposit-portal.com. Also, you can use the online contact sheet to contact IDP staff. It can be found on the menu on the top of each of the web pages.

From your Client Portal, you can also send a private message. Simply select "Private Messages" from the drop down menu. Next, type your private message in the Private Message section. A history of your private messages will be kept in your portal for easy review.



# How Do I Log Out?

You will find the option to log out at the top of your HUB page and opposite the drop down menu.