

Wealth Management

# WMG Client Point Mobile Getting Started Guide

#### 1. Search and Install for the Mobile App

Search and install the FNBO Wealth App in the Apple and Google stores by one of the following phrases.

- > FNBO Wealth
- FNN Trust Company
- FNBO Wealth Management
- FNBO Client Point
- FNBO TrustDesk



#### 2. Enter Access ID and Password

- A. If you are an existing Client Point user, enter your Client Point Access Id and password.
- B. If you are a new Client Point user, the enrollment process must be completed on the Client Point website first before signing into the FNBO Wealth App.
- C. Check the 'Save Access Id' box for future use.
- D. Enable Biometrics and Continue.
- E. Read and accept the Exchange Agreement and FNBO Wealth Client Agreement.

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nter Access ID & Password			
ccess ID			
assword	((((())))	)	(((M)))
ive Access ID	11111		111111
Cign In	This app now supports biometric	c authentication	Success! The next time you launch the
Sign in	(Fingerprint or Facial Recognition choose to sign in to the app using	n). You can ng either	application, you will be able to use biometric authentication.
	authentication. Remember, once anyone with a biometric scan on	e it's enabled your device will	
lick Guide	have access to your account infe can turn this feature off in Settin	ormation. You igs under the	
bout the App	More menu at any time.		
About Us: FNBO Wealth Management	Enable		
FNBO Privacy Policy © 2019 FNBO Wealth Management. All rights reserved.			
	NO, HIGHAS		Continue
FNBO We	ealth Client Agreement	Excl	hange Agreement
To be Agreed to I	by End User Prior to Use of the	You must read and conditions presen	d agree to all of the terms and ted below in order to activate your
Downloadable Ap	qo	subscription, ever conditions addres	n if some of the terms and as services that are currently not a
1. Ownership. Yo third party provid	ou acknowledge and agree that a der or licensor to your financial	part of your subso add services to yo	cription. We do this so that you may our subscription at a later date
services provider	r ("Licensor") is the owner of all	without having to conditions.	agree to additional terms and
software to be us	sed for access to mobile access	For security and a Wealth Manageme	administrative purposes, FNBO ent reserves the right to terminate
the computer pro	ograms contained therein in	your access to thi and without prior	is Mobile Application at any time notice.
accompanying us	e object code form as well as any ser documentation along with all	You must be a No	n Professional in order to complete
subsequent copi which are made a	es, updates or versions thereof available to you (if any),	this document. Pr establish a direct	relationship with most exchanges
regardless of the exist (collectively	media or form in which they may the "Software").	In order to receive	e items presented below you
2. License. Subj	ect to the terms and conditions	indicate that you interms and condition	have read and understood all the ions presented below, and that you
of this Agreemen	it, you are hereby granted a	intend to form a le	egally binding and valid contract
in accordance wi	th the terms of this Agreement.	and conditions pre-	esented below.
All rights not exp Agreement are h	ressly granted to you by this ereby reserved by the owner of	Professional - No	on Professional Declaration
the Software. No	thing in this license will entitle	You are a non-pro following criteria f	ofessional if you meet all of the for the entire term of our
you to receive ha	recopy documentation,	subscription Yea	are a protessional levestor if you
	Accept		Accept
			Decline
	Decline		

### 3. Navigating

- Initial Page All account(s) in the relationship.
  - a. Select the Positions or Activity ICONs at the bottom to view the relationship positions or activity.
  - b. Select an account to view positions from the initial page.



• Positions Page – ICON at the bottom of the page. Pie chart can be minimized.

TOTAL RELATIONSHIP		TOTAL RELATION	SHIP +		
\$5,000		\$5,000			
🛇 Sunmary		⊙ Summary			
	0.00% 91.36%	Cash & Equivalents	\$0		
	0.86% 6.00%	Equities	\$4,569		
		Fixed Income	\$88		
Cash & Equivalents	\$0	Alternatives	\$43		
➢ Equities	\$4,568	Other	\$300		
S Fixed Income	\$88				
S Alternatives	\$43				
Other	\$300				
	$(\pm)$				

• Drop down to display another group or account on Positions page.



• Activity Page – Filter activity and more information for each activity.



• Drop down to display another group or account on Activity page.

Year to Date Activity		CLIENT DEMO IRA ···			
View last 10 days of activity		View last 10 days of activity			
	Filter 🕎		Filtor	Y	
Depo: Groups and Accounts		Depo: Groups and Accounts			
Interest TOTAL RELATIONSHIP	.00 >	Interest occurs ocmo inn	1.00		
Divider	1.00	Divider CLIENT DEMO IRA	.00		
CLIENT DEMO IMA	.00	Comme CLIENT DEMO IMA	1.00		
Real Es	00 >	Real Es CLIENT DEMO IMA	0.00		
Miscell Receipt CLIENT DEMO IMA	1.00	Miscell CLIENT DEMO IRA Receipt	<ul><li>✓ 1.00</li></ul>		
Total D Activit	.00	Total D CLIENT DEMO IRA Activit	.00		
Cancel OK Trade	-	Cancel OK Trade	4		
Cost of Assets Purchased	\$0.00	Cost of Assets Purchased	\$0.00		
Proceeds on Sales/Maturities	\$0.00	Proceeds on Sales/Maturities	\$0.00		
Other Ascet Channes	¢n nn (+) Mara		*n nn (+)		

- More Service Page
  - a. Contact Us
  - b. First National Bank Page
  - c. Settings Page to set biometrics If biometrics is grayed out, ensure the phone allows for biometrics functionality and the biometric is set up.





## 4. Important Notes:

- There is no functionality to update the password within the Mobile App.
  - You will need to sign into the Client Point website to establish a new password and then sign into the Mobile App with the new password.
    - FNBO Wealth Management Client Point
    - FNN Trust Company Client Point
- If the Client Point Access id is updated in Client Point, you will need to sign into the Wealth Mobile App with new id.
- The Client Point Mobile App has no trading or transaction functionality.