Atlantic Union Bank® | Wealth Management

Total Wealth User Guide

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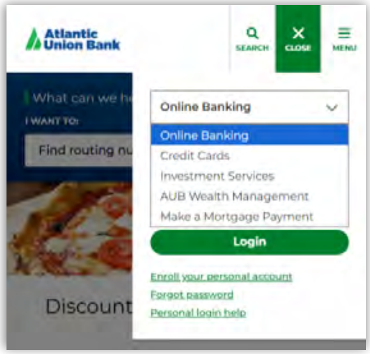
Thank you for being an Atlantic Union Bank Wealth Management (AUBWM) client, and welcome to your personal financial portal, AUBWM Total Wealth. Upon completion of the following steps, you will have access to your accounts anytime, anywhere.



Account Set Up and Initial Log In

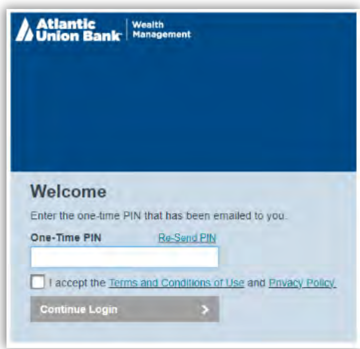
Step 1

- To get started, please visit AtlanticUnionBank.com and select "LOGIN" in the upper right-hand corner
- From the drop-down menu, select "AUB Wealth Management" and click "Login"

Step 2

- On the new page, select "AUBWM Total Wealth" and proceed to the log in
- The first time you log in, please use the credentials sent to you

Please note: If you are unable to log in or have not received credentials, please reach out to your Wealth Relationship Manager or Trust Advisor

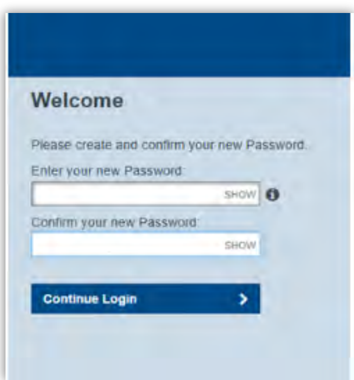


Step 3

After successfully entering your credentials, a one-time PIN will be sent to your email address to be entered on the prompted screen

Step 4

Select your security questions and input answers and then click "Continue"



Step 5

Create and confirm a new password. Password tips:

- Between eight and twenty characters
- Must contain at least one number, one upper case letter and one lower case letter
- Cannot contain an ampersand (&), spaces, greater than (>), or less than (<) symbols
- Passwords cannot have more than two repeating letters

To log in after this initial set up, please visit AtlanticUnionBank.com and select AUB Wealth Management from the log in menu

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Step 6

The new AUBWM Total Wealth platform is also available as a mobile app. To download the app, please search for "AUBWM Total Wealth" in either the Apple App Store or Google Play. Log in using your recently updated credentials. Please note: When first creating your User ID and Password, please use the desktop version of the platform.

If you experience any problems logging in, please reach out to your Wealth Relationship Manager or Trust Advisor

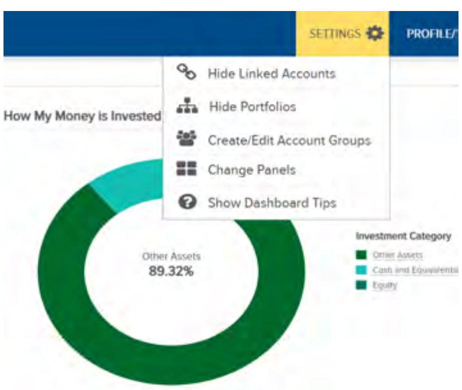
Using the AUBWM Total Wealth Portal

Dashboard

After log in, you will then be taken to the main dashboard. The dashboard offers multiple snapshots of information from across your accounts. To change the information shown, navigate to the Settings Menu and select "Change Panels." From there you can select from a range of panel options.

Dashboard Screen Legend

- Stackable Menu icon (upper left icon - expands the left-hand navigation menu upon clicking)
- Left Hand Navigation Menu (left hand side of the screen - each icon opens a different page)
- Settings (top right drop-down menu)
- Profile/Logout (top right drop-down menu)
- Contact Us (top right drop-down menu)
- Information Icon (located next to each dashboard panel



Settings

The Settings drop-down menu appears in the top-right corner of the dashboard home page and is represented by the gear icon. Here you can also control the information displayed on the dashboard by adding, removing or rearranging panels.

Create/Edit Account Groups

By clicking the Settings icon and then clicking the Create/Edit Account Groups option, you can group and rename accounts. By highlighting the appropriate account group and using the Add Account and Remove Account buttons, you can change the composition of account groups as needed.

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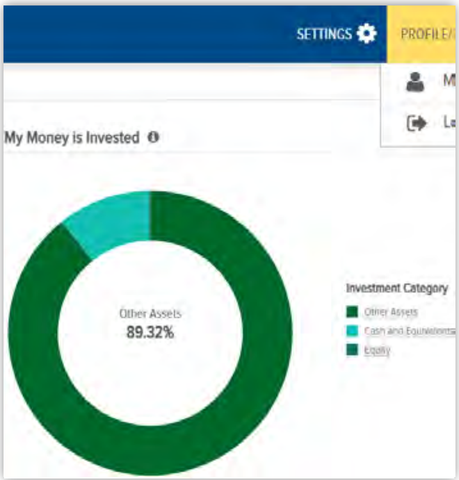


Profile Menu

The Profile drop-down menu appears in the top-right corner of the dashboard home page. This menu allows you to see basic personal information and provides an option to change your email address and/or statement delivery method. This is also where you can find the option to log out from the site.

Other General Information

Dashboard Links

On the dashboard page, there are links within the panels to various pages throughout the site. Clicking on these links will take you to the location within the site that provides for more details for that item. For example, within the Summary of Accounts panel, if you click on ‘Current Market Value’, ‘Unrealized Gain/Loss’, or ‘Total Cash’, you are taken to the Investments page.

Linked Accounts

Additionally, you can display or hide linked accounts throughout the site using the respective Show or Hide Portfolios toggle under the Settings menu in the header. Choosing to show or hide either on any page in the site will apply that configuration throughout the site, and you can alter this configuration at any time.

Column Selector

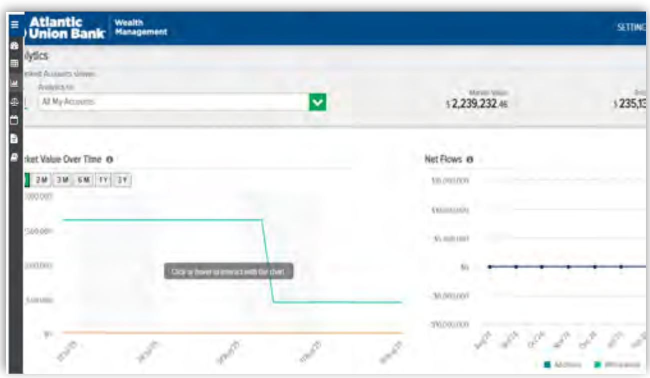
The column selectors for the tables that appear on the Investments and Realized Gain/Loss pages are configurable. Within the column selector, you can add or remove columns from the page instantly. Changes can be made as often as desired.

Export/Download

Many of the pages also include the ability to export the displayed information to Excel or download into a PDF document.

Clock Icon

Clock icons also appear throughout the site to indicate the last time that pages were updated.



Investments

The Investments page is represented on the left navigation menu by the calendar icon. Using the account selector, you can select the context for the page. Two views are available: Investments and Tax Lots. Tax Lots can be viewed by clicking on the Tax Lots tab located at the top of the page just underneath the account selector field.

Analytics

The Analytics page is represented in the left navigation menu by the bar graph. Each panel provides insight into a different aspect of your account: Market Value Over Time, Net Flows and How My Money is Invested.

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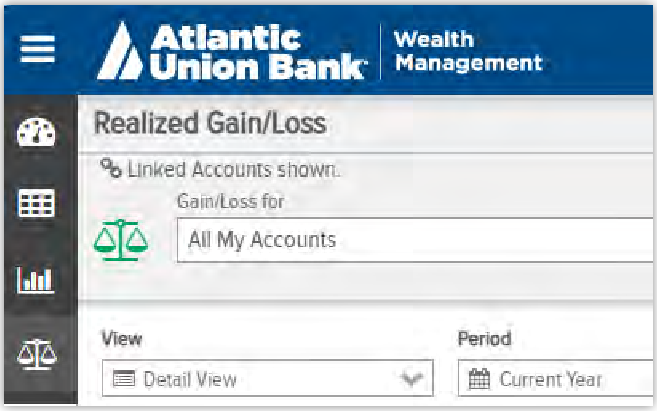

Realized Gain/Loss

The Realized Gain/Loss page is represented on the left navigation menu by the scales icon. The Realized Gain/Loss page allows you to select a Detail or Summary View of realized gain and loss for a specified period of time. In the Detail view, all transactions making up the Gain or Loss are displayed. In the Summary view, a simple table is displayed showing short-and long-term gain/loss.

Transactions

The Transactions page displays transactions for the account. Using the account selector, you can view account activity for all accounts or for individual accounts. You can also view account activity at the portfolio level and for account groups that you have set up. Under the Account Selector tab, you can choose the transaction and time period that drive the page results.

Documents

The documents page displays statements, tax documents and other materials shared by your Wealth Relationship Manager or Trust Advisor.

Contact Us

The Contact Us menu appears in the top-right corner of the dashboard home page. This provides easy access to the contact information for your Wealth Relationship Manager or Trust Advisor team.

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