

CLEARPOINT CLIENT PORTAL ENHANCEMENTS

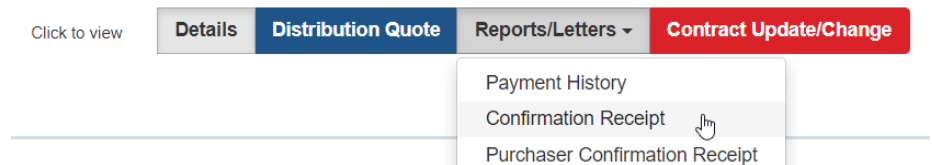


CONFIRMATION RECEIPTS

Confirmation Receipts are now available on the ClearPoint Client Portal. No need to keep a paper copy. This new feature will allow you to view and print Confirmation Receipts at anytime from anywhere. Please contact your ClearPoint Trust Administrator if you would like to discontinue receiving the printed version in the mail.

Where can you find the Confirmation Receipts?

When viewing a single contract go to the new tab labeled Reports/Letters.



COMBINED CONTRACT DETAILS | CONTRACT ITEMIZATION

We have added contract itemization to the Client Portal which shows the breakdown of the contract items below the current contract summary. In addition, we've added the ability for you to look at combined contract details. This feature is ideal for times when you have a purchaser with more than one contract, such as a funeral contract and a related cemetery contract. Or possibly for when a purchaser has bought trusts for both of his/her parents. This enhancement will allow you to see on one screen the itemization of the contracts, the funds received, balance remaining to pay, etc., and you can obtain disbursement quotes for the combined contracts with the click of a button.