Video transcript: "Regions Total Wealth Platform: Private Wealth Clients"

Video source: [Regions.com: Private Wealth Management]; [YouTube]

Note: Uplifting music plays.

On screen: Regions Private Wealth Management Logo

[Voice-over] As a Regions Private Wealth Management client,

[Voice-over] you'll enjoy access to Regions Total Wealth,

On screen: Female smiling looking to the right with faded people in the background photo fades in and new text on green rectangle: you'll enjoy access to Regions Total Wealth

[Voice-over] a powerful digital platform that provides you with:

On screen: Man on phone looking at his laptop photo fades in with a green bar at the bottom of screen and text: As a Regions Private Wealth Management client,

On screen: Screen fades to white with text: A powerful digital platform that provides you with:

[Voice-over] (bullet) a clear user-friendly view of both your overall portfolio

On screen: Circle graph chart animates with four different colors representing green for equity, blue for fixed income, yellow for cash and equivalents, and orange for other. Text below: A clear user-friendly view of both your overall portfolio

[Voice-over] and details for each account

On screen: My Accounts screen fades in showing two details of customer accounts. Text below: And details for each account

[Voice-over] the ability to see investments and portfolios from several different perspectives – by fund breakdowns, asset classifications, and more

On screen: Blue gradient background fades with animated charts and numbers. A solid blue rectangle overlay with text: fund breakdowns, another blue rectangle below with text: asset classifications and another blue rectangle below with text: and more…

[Voice-over] (bullet) plus robust and easy-to-read statements

On screen: A green circle fades in with the pdf icon in the center and text below: Plus robust and easy-to-read statements

[Voice-over] It's easy to access Regions Total Wealth by:

On screen: Screen fades to white with text: It's easy to access Regions Total Wealth by:

[Voice-over] Using a direct access link you received from our email:

On screen: A blurry image with a desk fades in with laptop in the center of screen containing an email with the text: Click here to log in to Regions Total Wealth. Arrow clicks on "Here".

[Voice-over] or Logging in from Regions.com.

On screen: Screen fades to Regions home page. Arrow clicks on Log In dropdown menu and selects the "Regions Total Wealth" option.

[Voice-over] or Logging in through Regions Online Banking. If you have a Regions checking account, you can set up single sign-on access to Regions Total Wealth through Regions Online Banking by contacting your advisor.

On screen: Screen fades to the Regions online banking home screen and slides down to the Save and Invest section. Arrow clicks on an account and a pop up menu appears that states "You are about to leave Regions Online Banking". Arrow clicks on "Continue" button and fades to the Regions Total Wealth page with user id and password screen. Arrow clicks to type in user ID and password. Arrow clicks on "Log In" button.

[Voice-over] Once you're logged in, your home page will display a dashboard with snapshots of key information covering your trust, investment and IRA accounts.

On screen: Screen fades to green while the Regions Total Wealth dashboard screen slides in from right with animated charts and account information.

[Voice-over] You'll see: A summary of your account value

On screen: Zoom into the dashboard and highlight the Summary of accounts section.

[Voice-over] A listing of the accounts in your relationship

On screen: The My Accounts section is now highlighted within the dashboard.

[Voice-over] A chart showing How your Money is Invested

On screen: The How My Money is Invested section is now highlighted within the dashboard containing a circle chart with investment categories.

[Voice-over] And your Top Holdings on both a Market Value and Cost Basis

On screen: The Top Holdings section is now highlighted within the dashboard containing holdings that are colored green to represent market value and black to represent cost basis.

[Voice-over] In the **Settings** menu, you can customize your **dashboard** with easy drag-and-drop panels, so your view displays the information that's most important to you.

On screen: Arrow clicks on Settings with dropdown menu. Arrow clicks on Change panels option. Change Dashboard Panels screen opens and drags panel to the dashboard to change the dashboard preferences. The dashboard now shows more options.

[Voice-over] Icons on the left will allow you to navigate to valuable data about your portfolio.

On screen: Zoom into the left-hand side of the dashboard to show icons. Text slides out of the screen: Icons on the left will allow you to navigate to valuable data about your portfolio.

[Voice-over] Let's look at a few key views:

On screen: Dashboard zooms back out with a black overlay and text: Let's look at a few key views.

[Voice-over] On the **Investments** page you'll see the assets for all your Accounts and you can use the Account selector to see specific Account details.

On screen: Black overlay fades out to reveal Dashboard while arrow clicks on the investment's icon on left-hand menu bar. Investments page fades in. Arrow clicks on the Investments for dropdown menu and displays each individual account.

[Voice-over] You can: Group assets by account name and number, portfolios or investment category and view information for specific periods of time.

On screen: The hand icon clicks on the Group By dropdown menu and highlights each one with the hand icon. Options are Account Name and Number, Portfolios and Investment Category. Then slides over to the Period dropdown.

[Voice-over] Choose to add optional columns to see even more detailed information.

On screen: The hand icon goes across screen to the columns dropdown menu and selects accrued income option to add to the table. Screen fades to black with text: Additional Column Added.

[Voice-over] On the **Transactions** page, you can view near real-time transactions for specific time periods, including any disbursements recently made from your account.

On screen: The hand icon goes across screen to the left-hand side menu and selects the transactions icon. Transactions screen fades in. Arrow clicks on the period dropdown menu to display options.

[Voice-over] In the **Analytics** section, you'll see the market value of your relationship over time, with values expressed as of close of the prior business day.

On screen: The hand icon goes across screen to the left-hand side menu and selects the analytics icon. Analytics screen fades in and displays animated market value over time chart with net flows chart next to it.

[Voice-over] The **Realized Gain/Loss** page allows you to select a Summary or Detail View of realized gain and loss.

On screen: The hand icon clicks on the Realized Gain/Loss icon from left-hand menu and that page fades in. The arrow selects the View dropdown menu with Detail View and Summary View options.

[Voice-over] In the Summary View, an easy-to-read table shows short- and long-term values for both realized and unrealized gains and losses.

On screen: The hand icon clicks on the Realized Gain/Loss icon from left-hand menu and that page fades in. The arrow selects the View dropdown menu with Detail View and Summary View options.

[Voice-over] Again, use the Account Selector to see account-level views of market values, and both realized and unrealized gains or losses.

On screen: Arrow clicks on Gain/Loss for dropdown menu to show all accounts. **[Voice-over]** In the Detail View, choose from multiple time and type filters to see all transactions making up the gain or loss you've specified in the table filters.

On screen: Arrow clicks on View dropdown menu and selects detail view option. Arrow selects on Period dropdown menu and then slides over to the Gain/Loss dropdown menu.

[Voice-over] And you'll find many of your relationship documents here in the **Documents** page, including statements. Simply choose the account and time period to find what you need.

On screen: The hand icon selects the documents icon from left-hand menu and the documents screen fades in with statements. Arrow selects the Period dropdown menu with various options. Hand clicks on Custom Date Range. The arrow selects the from date and to date and displays those statement options.

[Voice-over If you have questions,

On screen: Screen fades to white with a large question mark. The circle in the question mark is a pie chart and text in between: If you have questions…

[Voice-over] your Wealth advisor can even mirror your Regions Total Wealth online view to answer questions about how to access or understand your relationship information.

On screen: One dashboard slides in from right and the other from the left now besides each other with same information on the dashboard. Text below:

Your Wealth advisor can even mirror your Regions Total Wealth online view to answer questions

[Voice-over] Reach out to a Wealth Advisor today to learn more about Regions Total Wealth and the services we provide.

On screen: Text fades to white with text:
Reach out to a Wealth Advisor today to learn more about Regions Total Wealth and the services we provide.

On screen: Regions Private Wealth Management logo with disclosures.