

**Rockland Trust**  
**Investment Management Group**  
*IMG Wealth User Guide*



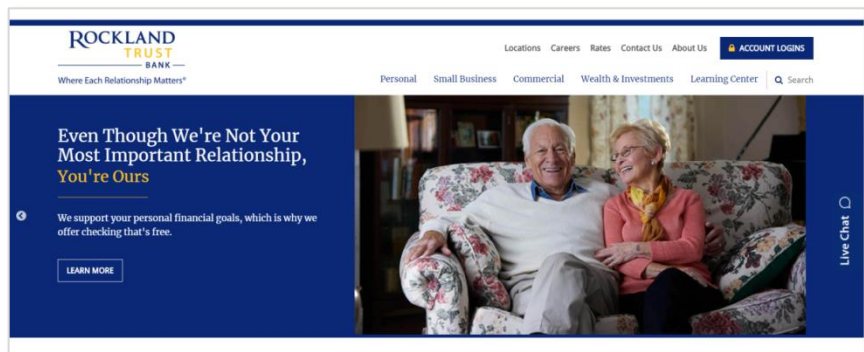
Welcome! Thank you for trusting Rockland Trust Investment Management Group (IMG) with your financial needs. Rockland Trust has been servicing the needs of our personal and business customers for over 100 years. At a bank Where Each Relationship Matters®, we are committed to providing our clients exemplary customer service through our products and services, support, and with leadership and resources.

In an effort to maintain our high level of customer service, we have embarked on upgrading our online client investment portal to the next generation. As a result, a few things have changed.

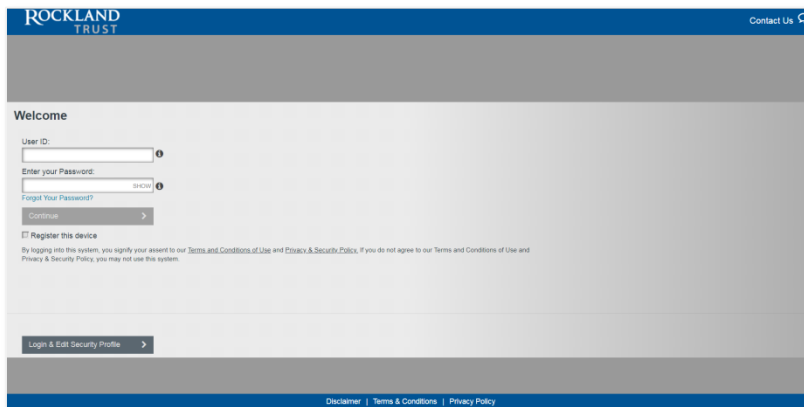
Included in this User Guide are instructions on how to access and navigate our updated online investment portal, *IMG Wealth*. Please contact your Relationship Manager for assistance with the platform or with questions you may have.

## HOW TO LOGIN

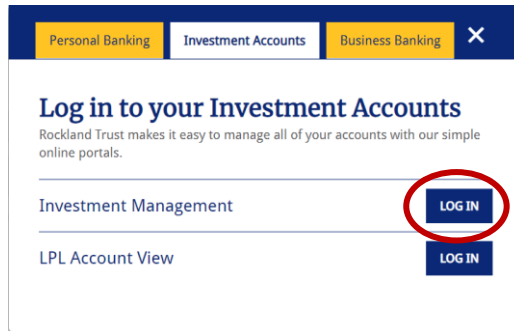
**STEP 1:** Open your Internet browser, such as Chrome and navigate to [www.rocklandtrust.com](http://www.rocklandtrust.com) Account Logins or you can open the site directly and bookmark the new URL, <https://rocklandtrust.ecx.seic.com>



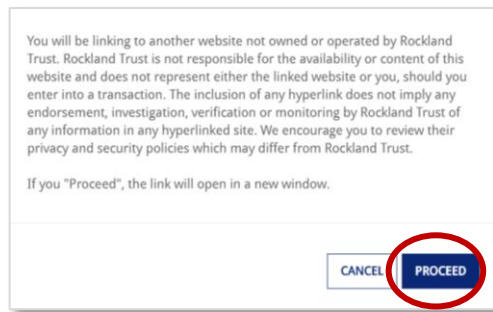
<https://rocklandtrust.ecx.seic.com>



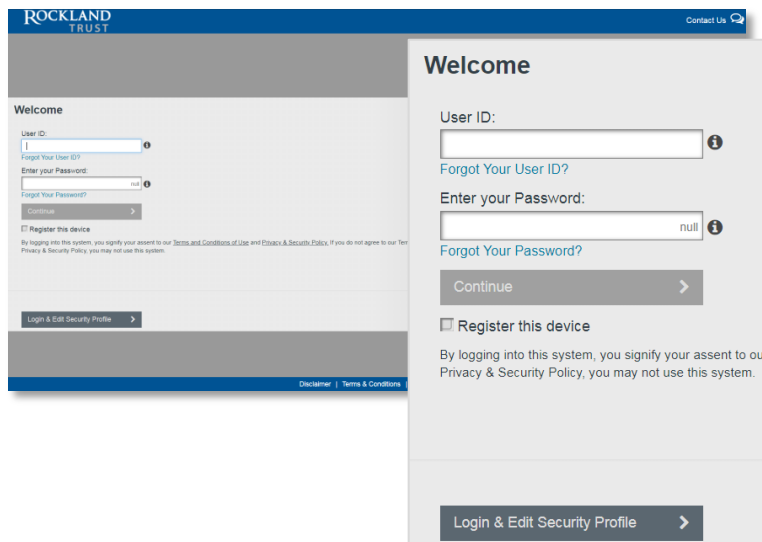
**STEP 2:** On RocklandTrust.com click on "ACCOUNT LOGINS" at the top right corner of the page and choose "Investment Accounts" and then "Investment Management" Login



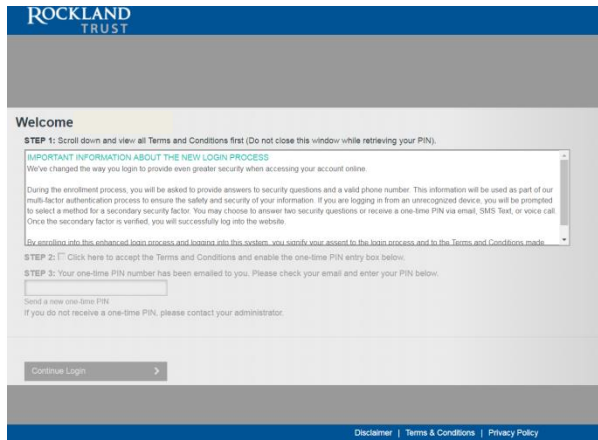
A pop up box will appear notifying you that you will be taken to another website outside of Rockland Trust. Click "Proceed"



**STEP 3:** Once at the Login Screen, type in the User ID and password sent in the mailer. You may either click *Continue* or if you wish to set up your security profile by choosing security questions and answers you click *Login & Edit Security Profile*. If you do not have your User ID, please call 1.508.732.7072 or your Relationship Manager for assistance.



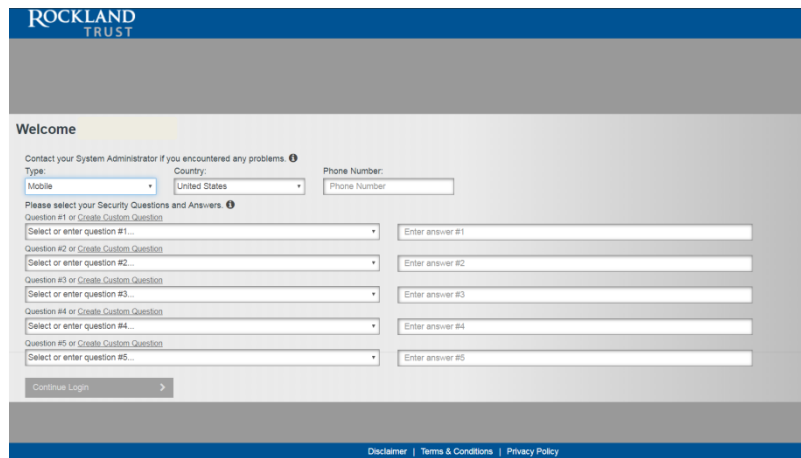
**STEP 4:** If you choose *Login & Edit Security Profile* the setup screen will appear. First read and accept the terms and conditions. A one-time temporary pin will be sent to your email that is good for only 20 minutes. You may access your email in another window to retrieve the one-time PIN, while doing so do not close the log in window as you will need to start over. Enter the one-time PIN into the text box on the screen and click, *Continue Login*.



Next, the Security Questions Screen will appear. Enter your phone number without hyphens. If you are using a non-US phone number, include the country code; otherwise, you can exclude it. Next, choose five security questions and answers. Each of the questions and responses must be unique. Responses must contain between 2 and 20 characters.

You may not use special characters. Answers are not case sensitive. Once complete, click *Continue*.

**Please note:** The security questions you previously established with the Investment Management account portal will *not* be carried over and you will need to reestablish new security questions and answers as part of the initial login process. The next time you log into the system, your two factor authentication choices will be to either answer these security questions or be sent a one-time pin via your email.

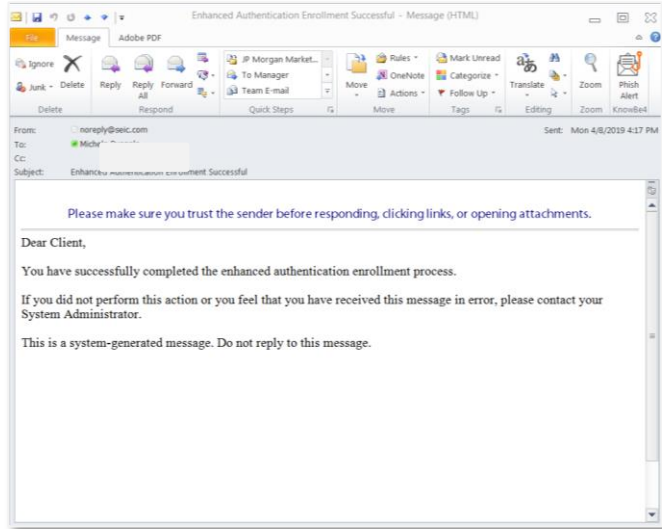
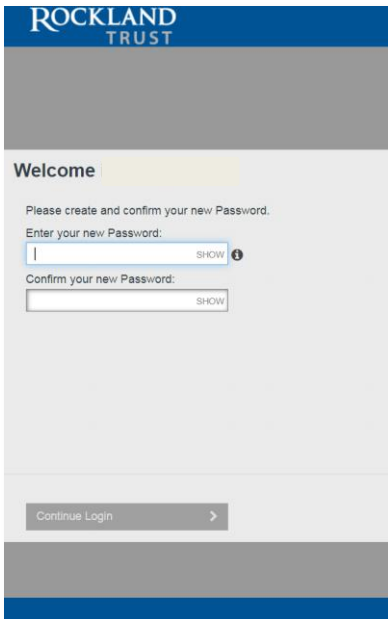


**STEP 6:** You will be prompted to change your Temporary Password that you received in the mail to a new custom password. Enter your new password in the first box and confirm the new password in the second box. See the password rules listed below. Once complete, click *Continue Login*.

(Note: You may register your computer so that you do not have to answer the security questions every time you login. Only register the computer if it is a personal computer.)

Password Must:	Password Cannot:
<ul style="list-style-type: none"> <li>Be a minimum of 8 characters</li> <li>Be a maximum of 20 characters</li> <li>Contain at least one number, one lower case letter, and one upper case letter</li> </ul>	Have more than 2 repeating characters

Once you complete your new password set up you will receive an automated email confirmation that that you have successfully completed the authentication enrollment process.

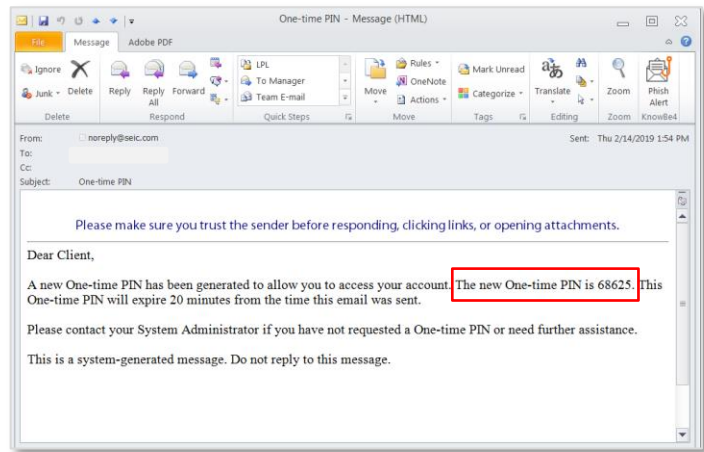
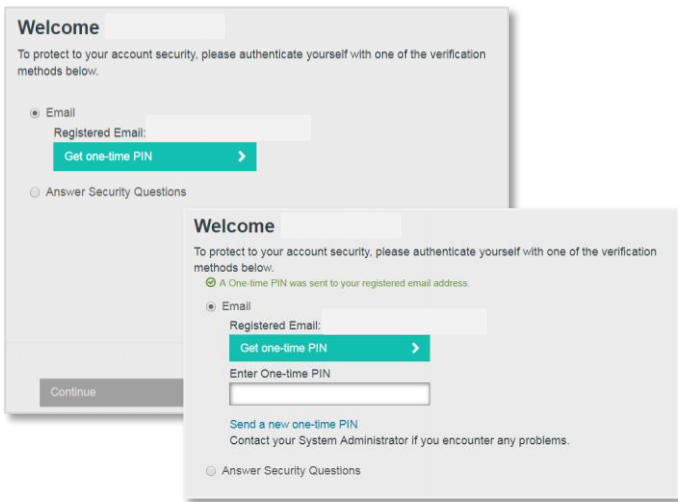


**STEP 7:** The next time you log into the system with your username and password, the two factor authentication screen will appear where you will have the choice to answer the security questions you set up or be sent a one-time pin via email. If you opt to answer the questions you will be sent to the question screen. If you choose to receive one-time pin, you may access your email in another window to retrieve the one-time pin. Enter the one-time pin into the text box on the screen and click *Continue*. If you did not receive the one-time pin, you may click the *Send a new one-time PIN* link on the screen.

**THE ONE-TIME PIN IS ONLY VALID FOR 20 MINUTES.**

Note: If you do not receive an email, be sure that you typed in your User ID correctly or check your email spam folder.

**Example One-Time PIN Email**



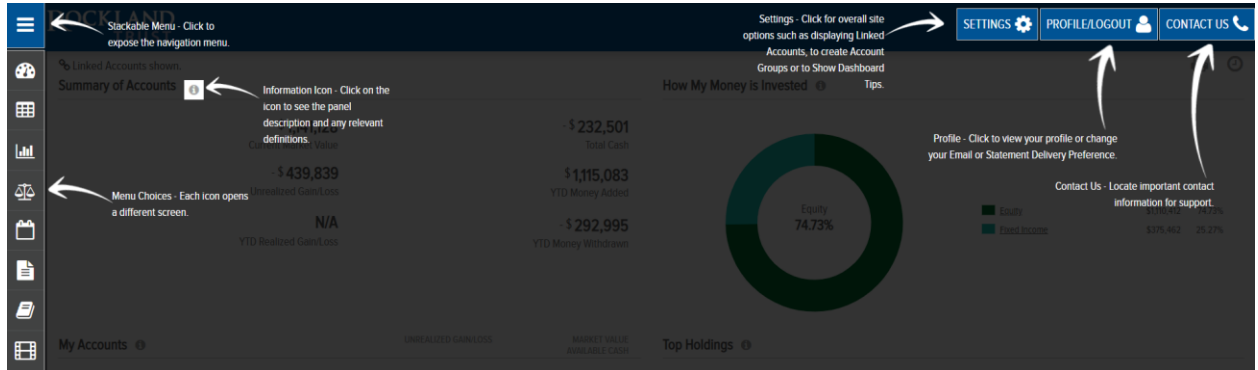
When you login in going forward, you can continue to do so through the Account Logins button on [www.rocklandtrust.com](http://www.rocklandtrust.com) or go straight to <https://rocklandtrust.ecx.seic.com>. If you bookmark the page you will need to bookmark this new URL <https://rocklandtrust.ecx.seic.com> NOT the login page where you enter your username and password.

**Your login process is now complete, Congratulations!**









When you are ready to log off the system, easily navigate to the top of the page and click "PROFILE/LOGOUT" to securely log off the system.

## NAVIGATION

After you've logged into your account, you'll be taken to a home page that provides an "at-a-glance" look and a helpful navigation guide will appear to display commonly used choices, as seen below.

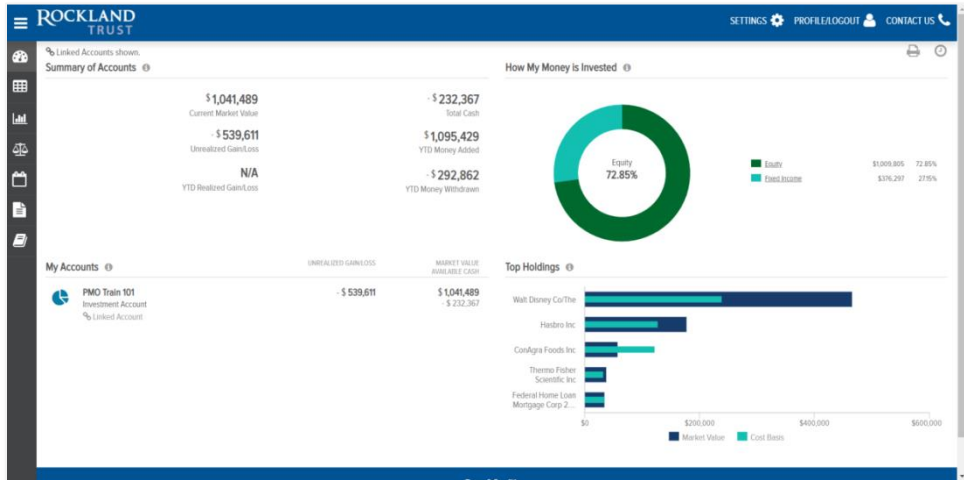


**You can always view tips on how to navigate the platform by clicking on Settings → Show Dashboard Tips**

-  Dashboard
-  Investments
-  Analytics
-  Realized Gain/Loss
-  Transactions
-  Documents
-  Glossary
-  Media Center

## HOME TAB / DASHBOARD

The Home Tab displays a summary of your accounts balances, your asset allocation, a list of your account(s), and top holdings. The Home Page is customizable (customize via the Settings button) to display the information most important to you. Click on the name of your account show under the My Accounts to navigate to the Investments page.



### Summary of Accounts

This is a summarized view of the accounts to which you have access. This section gives you a view of the following elements:

- **Current Market Value:** The current market value is the total value of all the assets and cash you hold across all your investment accounts as of today.
- **Unrealized Gain/Loss:** The unrealized gain loss is the difference between the total current market value and the total original investment cost since the original transfer or purchase of assets. The gain/loss will be depicted as an up arrow when the current market value is more than the original investment cost. The gain/loss will be depicted as a down arrow when the market value is less than the original investment cost.
- **YTD Realized Gain/Loss:** The realized gain/loss will display the year to date amount of gains and losses resulting from the sale of securities or capital gain distributions.
- **Total Cash:** This is the available cash in all of your accounts net of any pending transactions.
- **YTD Money Added:** The YTD Money Added will display the cash or securities added to your account(s) year to date.
- **YTD Money Withdrawn:** The YTD Money Withdrawn will display the cash or securities withdrawn from your account(s) year to date. Fees will not be included in this amount.

### How My Money is Invested

This graph provides a breakdown of how your account(s) are invested by asset class. You may click or press any segment to view the asset class, market value, and percentage allocated to each asset class.

### Top Holdings Graph

The Top Holdings panel on the Dashboard displays the five largest holdings by market value across all accounts.



## MY ACCOUNTS / INVESTMENTS

Click on the name of your account shown under the *My Accounts* or the *Investments* icon in the left hand menu to view information about each of your accounts. The Investments table shows all the assets you hold within your investment account(s) including account number, market value, total cash, and unrealized gain/loss.

Asset Name & Identifier	Investment Category	Units	Price	Cost Basis	Unrealized Gain/Loss Amount	Market Value	Estimated Annual Income
<b>TOTAL</b>				\$1,813,468.72	-\$539,611.15	\$1,041,489.90	\$30,868.69
Alphabet Inc Cap Stk Cl A GOOGL / 02079K305	Equity	15.00	\$1,211.45	\$15,500.00	\$2,671.75	\$18,171.75	\$0.00
Aqua America Inc WTR / 03836W103	Equity	263.00	\$36.76	\$8,000.00	\$1,667.88	\$9,667.88	\$233.11
AT&T Inc T / 00206R102	Equity	360.00	\$32.35	\$11,000.00	\$646.00	\$11,646.00	\$742.90
BlackRock Inc BLK / 09247X101	Equity	13.00	\$445.30	\$5,000.00	\$786.30	\$5,786.30	\$172.87
Corner Corp CERN / 15678Z104	Equity	141.00	\$57.32	\$7,000.00	\$1,082.12	\$8,082.12	\$0.00
CH Robinson Worldwide Inc CHRW / 1254W209	Equity	95.00	\$89.46	\$8,000.00	\$498.70	\$8,498.70	\$190.49
Chubb Limited Com CB / H1467J104	Equity	70.00	\$137.59	\$9,000.00	\$631.30	\$9,631.30	\$205.63
ConAgra Foods Inc CAG / 205887102	Equity	2,040.00	\$28.29	\$122,400.00	-\$64,688.40	\$57,711.60	\$1,765.20
Facebook Inc FB / 30303M102	Equity	10.00	\$175.72	\$60.00	\$1,697.20	\$1,757.20	\$0.00

You may view all of your accounts or a single account by using the account selector in the upper left hand corner. The top of the page will display a summary of your Total Market Value, Total Cash, and Unrealized Gain/Loss for the account(s) you are viewing.

You may use the “Group By” dropdown option above the table to group your assets by various categories such as account name & number and investment category. You may also use the “current holding” dropdown to view your assets as of a previous point in time. **As of holdings will not be available prior to live date, September 3, 2019.**

Above the right side of the table are various icons which allow you to search, customize the columns in the table, download, print, and view the last update time of the page.

- **Account Name & Number:** This view will group investments by account name and number.
- **Portfolios:** This view will group investments by portfolio.
- **Asset Name & Identifier:** The name of the asset in which you are invested and its unique market identifier.
- **Investment Category:** The category of asset to which your investment belongs (e.g. Fixed Income, Equity).
- **Units:** The number of fund units or shares held.
- **Price:** The latest price available for the asset.
- **Cost Basis:** The total initial cost of purchasing an asset. If you have purchased your holding over multiple dates, then this value is the total cost of all individual purchases.
- **Unrealized Gain/Loss Amount:** The unrealized gain / loss is the difference between

the total current market value and the total original investment cost since the original transfer or purchase of assets.

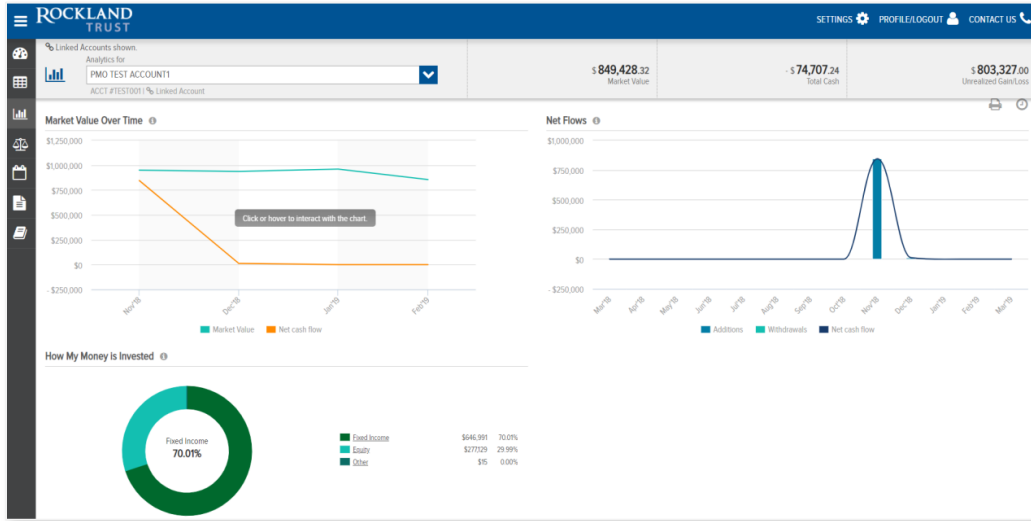
- **Market Value:** The current market value is the value of the asset as of today.
- **Estimated Annual Income:** The estimated annual income is an estimate of the interest and dividends expected to be earned on investments in the next 12 months and it is based on past interest and dividend payments made by the securities held in an account.
- **Accrued Income:** The amount of income accrued for the asset as of today.
- **Current Yield:** The annual rate of return received from an investment, based on the income received during a year compared with the investment's current market price.
- **Investment Category:** This view will group investments by asset class.

The *Tax Lots* tab will display the following:

- **Investment Asset Name & Identifier:** The name of the asset in which you are invested and its unique market identifier.
- **Account & Portfolio:** This view will group investments by account name and portfolio.
- **Holding Period:** The amount of time an asset is held.
- **Date Acquired:** The date an asset was purchased by the account.
- **Units:** The number of fund units or shares held.
- **Cost Basis:** The total initial cost of purchasing an asset. If you have purchased your holding over multiple dates, then this value is the total cost of all individual purchases.
- **Market Value:** The current market value is the value of the asset as of today.
- **Unrealized Gain/Loss Amount:** The unrealized gain/loss is the difference between the total current market value and the total original investment cost since the original transfer or purchase of assets.

## ANALYTICS

The Analytics page displays information regarding market value over time, net flows, and account holdings broken out by asset type. Summary information is displayed on the page visually and assets are shown in categories on the page as well.



### Market Value Over Time

The Market Value Over Time graph is a 13 rolling month graphical view of the historical market values of your portfolio and net investment. You may interact with the graph by hovering over the portfolio value and net investment lines to view the account details for a specific period.

The net investment is the difference between the additions and withdrawals in your account. The net investment does not include fees and income.

### Data as of

This will display the last date this graph is reflecting. The data is calculated quarterly and will be updated approximately 3 weeks after the quarter end.

### Net Flows

The Net Flows graph reflects cash and securities flowing in and out of your account(s). The net investment is the difference between the additions and withdrawals in your account. The net investment does not include fees and income.

You may hover over the additions and withdrawals bars and the net investments line to view the account details.

### How My Money is Invested

This graph provides a breakdown of how your account(s) are invested by asset class. For multi-asset class funds, this graph will display the underlying allocation for each fund.

You may hover over any segment to view the asset class, market value, and percentage allocated to each asset class.

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## REALIZED GAINS/LOSS

The realized gain/loss page will display the amount of gains and losses resulting from the sale of securities or capital gain distributions. The Detail view will display all transactions that resulted in a gain or loss. You may view this data for the current year or use the filter at the top of the table to view previous year gains & losses. The summary view will provide a summary of your short and long term gains & losses for the current year and previous year, as well as display your unrealized gains/losses.

Upon launch, detailed information will populate on a go forward basis. Summary information will be available starting Day 1.

Above the right side of the table are various icons which allow you to customize the columns in the table, download, print, and view the last update time of the page.

- **Account & Portfolio:** This displays the account and portfolio in which the gain/loss occurred.
- **Type:** The type describes the type of transaction that resulted in a gain or loss.
- **Transaction Date:** The date on which the transaction occurred.
- **Asset Name & Identifier:** The asset name & identifier will display the asset that was sold or received the capital gain that resulted in the gain/loss.
- **Short Term Gain/Loss:** A short term gain/loss is the result of the sale of an asset that has been held for exactly one year or less.
- **Long Term Gain/Loss:** A long term gain/loss is the result of the sale of an asset that has been held for longer than 12 months.
- **Detail:** This page provides a detailed view of the gains and losses in your account(s) based on your account activity.
- **Summary:** This page provides a summarized view of the gains and losses in your account(s).
- **Current Year:** This view provides the gains and losses in your account(s) for the current year.
- **Previous Year:** This view provides the gains and losses in your account(s) for the previous year.
- **All Gain/Loss:** This view displays the all of the gains and losses in your account(s).
- **All Gains:** This view displays only the gains in your account(s).
- **All Losses:** This view displays only the losses in your account(s).
- **Short Term Gain:** This view displays only the short term gains in your account(s).
- **Short Term Loss:** This view displays only the short term losses in your account(s).
- **Long Term Gain:** This view displays only the long term gains in your account(s).
- **Long Term Loss:** This view displays only the long term losses in your account(s).
- **All Short:** This view displays only the short term gains and losses in your account(s).
- **All Long:** This view displays only the long term gains and losses in your account(s).

## TRANSACTIONS

The Transactions tab is a summarized view of the transactions in your account(s). You may view transactions for all of your accounts or a single account by using the account selector in the upper left hand corner. The top of the page will display a summary of your Total Market Value, Total Cash and Unrealized Gain/Loss for the account(s) you are viewing. The drop down in the left hand corner below the header ribbon allows you to filter the transaction by the transaction type. The drop down to the right allows you to indicate the time period for which you want to view the transactions in your account(s).

Transaction Date	Transaction Type	Transaction Description	Account & Portfolio	Units @ Price	Amount
04/05/2019	Withdrawals-Cash Disbursements	Cash Disbursement - Miscellaneous Via Check, Paid To Train 101, PMO	PMO Train 101 ACCT #PMOTRAIN101	-	-\$130,000.00
04/04/2019	Security Sales	Sale 19274.28 Units of Federated Prime Cash Obligations Fund @ 1 USD	PMO Train 101 ACCT #PMOTRAIN101	19,274.28 @ \$1.00	\$19,274.28
04/02/2019	Security Purchases	Purchase 8 Shares of Independent Bank Corp/Rockland MA @ 71.8136 USD	PMO Train 101 ACCT #PMOTRAIN101	8.00 @ \$71.8136	-\$574.51
04/02/2019	Security Purchases	Purchase 8 Shares of Independent Bank Corp/Rockland MA @ 71.8136 USD	PMO Train 101 ACCT #PMOTRAIN101	8.00 @ \$71.8136	-\$574.51
04/02/2019	Security Purchases	Purchase 8 Shares of Independent Bank Corp/Rockland MA @ 71.8136 USD	PMO Train 101 ACCT #PMOTRAIN101	8.00 @ \$71.8136	-\$574.51
04/02/2019	Security Purchases	Purchase 8 Shares of Independent Bank Corp/Rockland MA @ 71.8136 USD	PMO Train 101 ACCT #PMOTRAIN101	8.00 @ \$71.8136	-\$574.51
04/02/2019	Security Purchases	Purchase 8 Shares of Independent Bank Corp/Rockland MA @ 71.8136 USD	PMO Train 101 ACCT #PMOTRAIN101	8.00 @ \$71.8136	-\$574.51
04/02/2019	Income-Dividend	Cash Receipt - Cash Dividend via MEMO	PMO Train 101 ACCT #PMOTRAIN101	-	\$618.93
04/02/2019	Income-Dividend	Cash Receipt - Cash Dividend via MEMO	PMO Train 101 ACCT #PMOTRAIN101	-	\$618.93
04/02/2019	Income-Dividend	Cash Receipt - Cash Dividend via MEMO	PMO Train 101 ACCT #PMOTRAIN101	-	\$618.93
04/02/2019	Income-Dividend	Cash Receipt - Cash Dividend via MEMO	PMO Train 101 ACCT #PMOTRAIN101	-	\$618.93

Transactions coming over from the old portal will look a little different than the new transactions – historical transaction descriptions will all be in capital letters. Historical transactions that were on our old system will be available to view on this new system up to 17 months from conversion date, September 3, 2019.

Above the right side of the table are various icons which allow you to download, print, and view the last update time of the page.

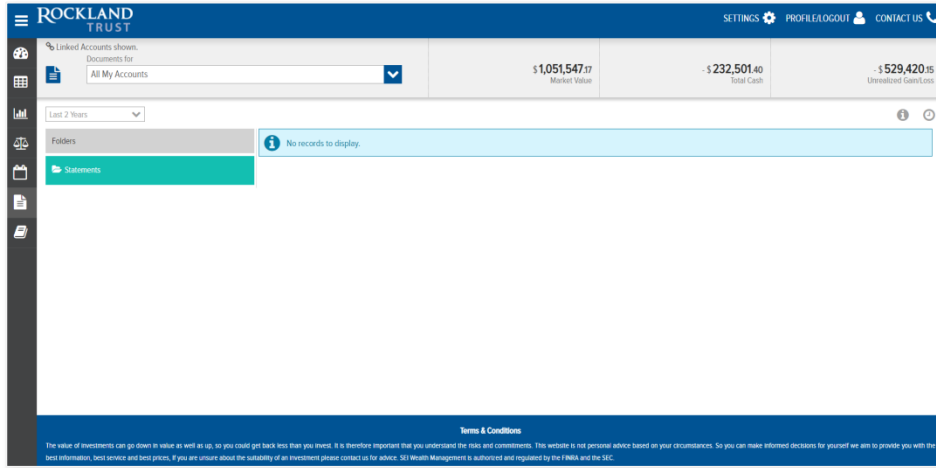
This section gives you a view of the following:

- **Transaction Date:** The date on which the transaction occurred.
- **Transaction Type:** This indicates the type of transaction that occurred in your account(s).
- **Transaction Description:** The Transaction Description identifies the investment vehicle for which the transaction occurred.
- **Account & Portfolio:** Account & Portfolio identifies the account owner and account number for which the transaction occurred.
- **Units @ Price:** The number of units or shares sold and the price at the time of the sale.
- **Amount:** This indicates the value of the transaction.

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## DOCUMENTS

The *Documents* page provides you with access to your on-line document library. Here you can view the statements and tax forms applicable to your account(s). Supported tax forms include 1099 and 5498 forms.



You may view your documents for all of your accounts or a single account by using the account selector in the upper left hand corner. The top of the page will display a summary of your Total Market Value, Total Cash and Unrealized Gain/Loss for the account(s) you are viewing.

You can view your documents by selecting the **Statements** folder. Click on the PDF icon to open your document in a new browser tab. Once open, you can view, print or save a copy of the document.

By selecting from the drop down in the left hand corner below the header ribbon, you can select the time period for which you want to view your documents, ex: last 30 days.

In the **Statements** folder you can view electronic versions of your monthly or quarterly account statements. These documents are stored in PDF format. Previous statements up to 17 months of the live date that are currently archived will be available. Former MAUI users will need to contact their Relationship Manager for archived statements.

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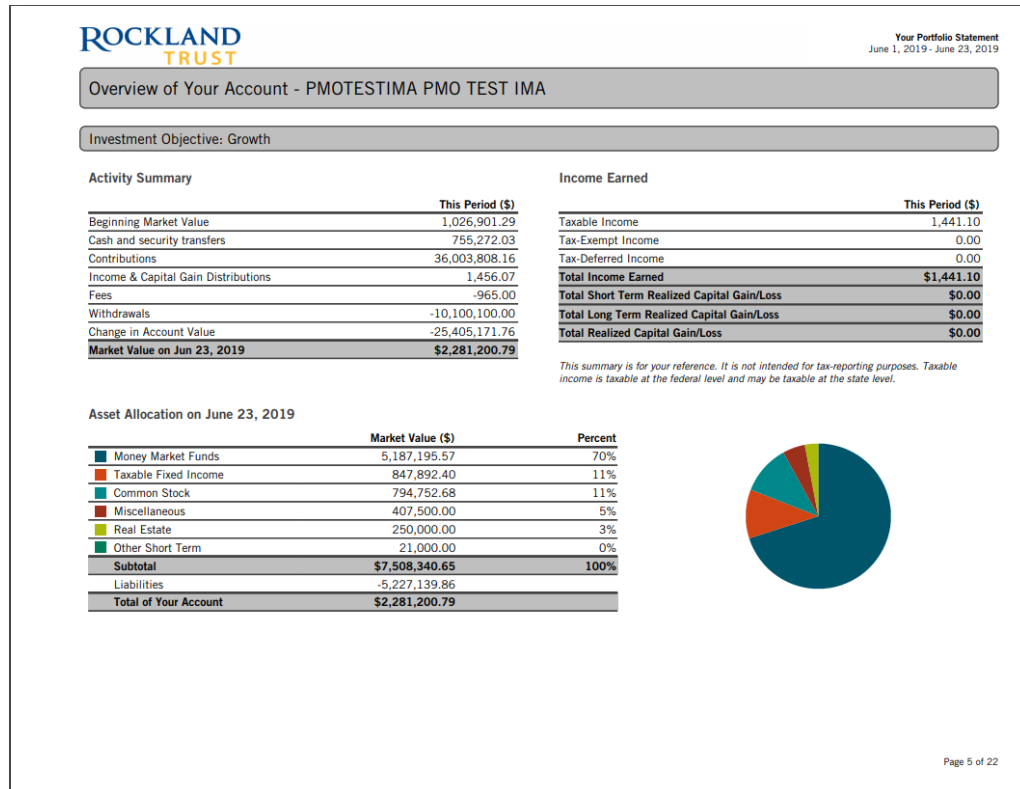
## MEDIA CENTER

The Media Center page will offer Rockland Trust Investment Management Group (IMG) content including Wealth of Insights newsletter articles, the monthly Market Watch analysis, links to recent IMG team media appearances, and more. At IMG we aim to be a trusted resource for all of your financial decisions including keeping you up to date with the latest market and economic activities, as well as helpful tips, articles, and guidance on each of our areas of business so you can navigate your financial future.

## UNDERSTANDING YOUR STATEMENTS

Whether you choose to receive your statements electronically online or printed paper statements, you will benefit from detailed account information for each of your accounts with Rockland Trust IMG. Each portfolio statement details your account activity and income earned for each period as compared to year-to-date. In addition, colorful graphs illustrate your asset allocation.

It is important to note that non-calendar year-end reporting is available on some statement packages.



\*Example for illustrative purposes only

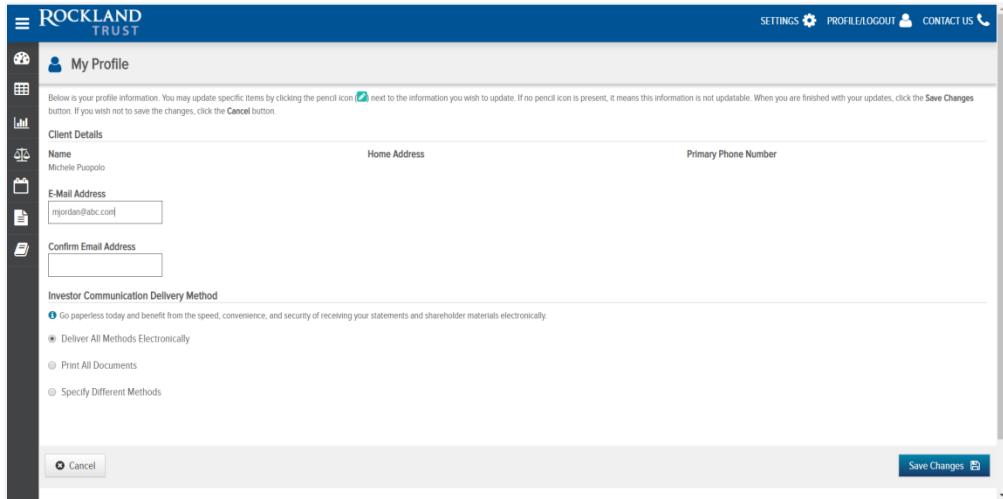
Note: Due to the upgrade statements will change.

- Annual statement recipients will receive two statements this year, one covering the period prior to August 31, 2019 and a second covering the period from September 1, 2019 forward.
- Quarterly statement recipients will receive two statements in the third quarter, one covering the period from July 1, 2019 to August 31, 2019 and a second covering the period from September 1 – September 30, 2019.
- Monthly statement recipients will receive three statements this year.

## ENROLLING IN E-DELIVERY

For certain or all statements, you have the option to opt-out of paper delivery in favor of viewing them online only on this website, and receiving an email notification when the statements become available.

To sign up for e-delivery of statements, click on the “Profile” link in the upper right hand side of the home page. Click on “My Profile”. Under “Investor Communication Delivery Method” you can select which you delivery option you prefer to receive your statements.



The screenshot shows the 'My Profile' page for Rockland Trust. The page has a dark blue header with the Rockland Trust logo and navigation links for SETTINGS, PROFILE/LOGOUT, and CONTACT US. Below the header, there's a 'My Profile' section with a user icon and a brief instruction: 'Below is your profile information. You may update specific items by clicking the pencil icon next to the information you wish to update. If no pencil icon is present, it means this information is not updatable. When you are finished with your updates, click the Save Changes button. If you wish not to save the changes, click the Cancel button.' The 'Client Details' section includes fields for Name (Michele Puopolo), Home Address, and Primary Phone Number. The 'E-Mail Address' section has a field with 'mjordan@abc.com' and a 'Confirm Email Address' field. The 'Investor Communication Delivery Method' section has a blue information icon and text: 'Go paperless today and benefit from the speed, convenience, and security of receiving your statements and shareholder materials electronically.' There are three radio button options: 'Deliver All Methods Electronically' (selected), 'Print All Documents', and 'Specify Different Methods'. At the bottom, there are 'Cancel' and 'Save Changes' buttons.

After you enroll in e-delivery, you will receive a confirmation email. In order for the changes to take effect, you must confirm your election of e-delivery by clicking the link within the confirmation email. This registration must take place within 72 hours of your enrollment in e-delivery or the changes will not take effect and paper statements will continue to be sent via mail.

## CUSTOMIZATION

You may customize your Dashboard to display the information that is most important to you. To review these instructions, go to Settings → Change Panels. To modify, drag and drop any of the available panels on the right side of the screen into the placeholders on the left. You may choose two mini panels or one wide panel in the upper left, and select from the available wide panels for the remainder of the dashboard.

## Create / Edit Account Groups

Account groups allow you to create custom groups of accounts to organize them in a way that is more meaningful to you. You can use the below options to create an account group, name it and add (or remove) accounts to be a part of that group. Account groups are then displayed in the Account Selector within the site.



## CONTACT US

To contact us with any questions you can easily access the Contact Us button on the top right corner which will display our phone number, 1.508.732.7072.

## FAQs

### Login Troubleshooting

#### **Q: What do I do if my login is not working?**

A: First make sure you have followed the steps below:

1. Use the User ID that was provided to you, this could be different from what you were using previously.
2. Use the Temporary Password, provided in the mailer (case sensitive).
3. Enter the One-Time PIN from your email within 20 minutes of receiving email.

If you are still experiencing difficulty logging in please contact your Relationship Manager for further assistance.

#### **Q: I forgot my password what should I do?**

A: Click on the "Forgot Password?" link on the login screen. You will have to answer security questions and a new one-time PIN will be sent to your email address. Upon entering the one-time PIN, you will be able to create a new password.

#### **Q: I forgot the answers to my security questions how can I reset them?**

A: Enter your user ID and password and click the Login & Edit Security Profile button on the bottom of the screen. You will need to request a one-time PIN and enter it into the system. You will then be taken to a page where you can update either your phone number and security questions or your password. Choose Phone Number / Security Questions and re-select five questions and input answers. Please reference the rules for security questions earlier in this document. When finished click *Update* and your changes will be saved. Click *Done* to be logged into the website.

#### **Q: I am locked out of the system how do I get reset?**

A: Contact your Relationship Manager to help you reset.

**User ID:** The User ID that was provided to you, this may be different from your previous user ID

**Temporary Password:** found in mailer (case sensitive)

**New website URL:** <https://rocklandtrust.ecx.seic.com>

(Please update your bookmark with this link if you use one)

## Account Information

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### Q. I'm not sure the data on the website is correct. What should I do?

A. Contact your Relationship Manager with any questions pertaining to your account.

### Q. Will my current transaction history be available to me after the upgrade?

A. Your last 17 months of statements and transactions will be archived in the system and available as of September 4, 2019. The standard archiving of statements will continue to take place on the new system.

For former MAUI users, with this upgrade transaction history from MAUI will *not* be moved to the new system. You may request previous statements from your Relationship Manager.

## MOBILE APP

Rockland Trust IMG offers a free online app, *IMG Wealth* that allows you to monitor your portfolio 24/7 from your mobile device or tablet while you're on the go. *IMG Wealth* provides access to view your investment accounts in a safe and secure way. In just a few clicks you can view your holdings, asset allocations, and transactions.

In addition, the app's capabilities include:

- › A dashboard summarizing your investment account(s), market value, and gain/loss tracking ability
- › Graphical views showing the value of your investments over time
- › Landscape views for more detailed views of your account(s)

## Downloading the App

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Follow these instructions to download the app onto your mobile device. Prior to downloading the app please ensure you have successfully logged into the desktop client portal as you will require the updated username and password.

Open the iOS Apple Store or Android Google Play Store on your mobile device to download the Rockland Trust Investor app.

### Apple Store:

1. To download apps your phone will need access to Wi-Fi, 3G or 4G internet
2. Open the App Store app from the menu
3. Search for the app titled **IMG Wealth**
4. Download the app. Click on "Get" and then "Install". Once you have selected install a circle will show the app downloading and the app will appear loading on a space on your iPhone screen.
5. Click "Open" from the App store to launch the application or click the app on your home iPhone screen
6. Sign in with the same username and password you use for the desktop version of the site. The same instructions as stated above will apply here – for example, upon signing in a one-time PIN will be sent to your email or you will be asked to answer your security questions.

## Google Play Store:

1. To download apps your phone will need access to Wi-Fi, 3G or 4G internet
2. Open the Google Play Store app from the menu
3. Sign in with your Google account
4. Search for the app titled **IMG Wealth**
5. Install the app. Select the IMG Wealth and press "Install"
6. Accept permissions. It will ask for your permissions, simply select "Accept"
7. Wait until the installation is complete. You will see a notification bar when the installation has been successful.
8. Launch the app.
9. Sign in with the same username and password you use for the desktop version of the site. The same instructions as stated above will apply here – for example, upon signing in a one-time PIN will be sent to your email or you will be asked to answer your security questions.

The app looks similar to the website version on your desktop computer. Mobile screenshots are below for reference. Should you have any questions or run into any issues please contact your Relationship Manager.

