



Wealth Management & Securities Services

Global Corporate Trust Services Client Information Delivery

Corporate/Municipal Administration

Client Registration and Log On Procedures

June 2013

Register and Log On to the Client Information Delivery System

Register as a New User

You must register as a new user before your initial log on to the Client Information Delivery Portal.

1. Launch your browser.
2. Navigate to, <https://usbtrustgateway.usbank.com/portal/login.do>. The Login page appears.
3. Click the **New User - Register Here** hyperlink.



The screenshot shows the Us Bank Trust Gateway Portal. At the top left is the Us Bank logo and the text 'Trust Gateway Portal'. At the top right is the slogan 'All of us serving you®'. Below this is a dark blue navigation bar with three items: 'Products and Services', 'Fact Sheets', and 'Customer Service'. The main content area is divided into three sections. On the left is a login form with 'User ID:' and 'Password:' labels, input boxes, a 'Log In' button, and a red arrow pointing to the 'New User - Register Here' link. Below the form is a 'Forgot password?' link and a note about login assistance. The center section is a large banner with the text 'Global Corporate Trust Services' and the tagline 'Financial strength. Local expertise. Global reach.' accompanied by an image of a woman in a business suit working on a laptop. The right section contains a 'How may we help you?' heading with a 'New Customers' link, and a 'Market News and Insights' section with three article links, all dated May 1, 2012.

4. The Trust Gateway Portal Terms of Use page appears. Click **I Accept** to agree to the terms of usage. Click **I Decline** if you do not accept the terms of usage, and do not wish to continue registering.

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Trust Gateway Portal Terms of Use:

Please read and accept the agreement to continue.

Please read these terms and conditions of use carefully. The Terms of Use ("Terms of Use") apply to the use of the Trust Gateway Portal ("TGP") website and to the use of any information, software, function or graphics, including any associated media, printed materials, and "online" electronic documentation (collectively referred to herein as the "TGP Content").

By accessing and using the TGP website and the TGP Content, you ("you" or "the user") agree to the terms and conditions of use set forth herein and to any changes, modifications or amendments that U.S. Bank National Association and/or its affiliates ("U.S. Bank") may publish on the TGP website from time to time. If you do not agree to the Terms of Use, do not access this website or any of the services provided on the TGP website.

Access to Trust Gateway Portal Services:

Trust Gateway Portal Services ("TGPS") are provided as a convenience and a courtesy to industry participants (including but not limited to national recognized statistical rating agencies and market data providers, if specified by contract) and to customers and business partners of U.S. Bank Corporate Trust Services and Institutional Trust & Custody ("U.S. Bank Trust"). By registering for access to TGPS and selecting your unique User ID and Password you will have access to a number of services offered by U.S. Bank Trust. TGPS offers access to services via a single on-line registration process; however, additional approval and acknowledgment of additional legal disclaimers is required for access to certain restricted and non-public services and information.

You shall be responsible for all activities resulting from the use of your User ID, and Password, including any unauthorized use. You will immediately notify U.S. Bank if you become aware of, or suspect, termination of relationship with authorized entity, unauthorized disclosure, unauthorized use or loss of you User ID, and/or password.

If you attempt to gain access to TGPS in a manner that exceeds your assigned access level or if you use a name other than your legal name or derivative you may be prosecuted as provided under Public Law 99-508 Section 2701.

You may not use the information or material on this website for any unlawful purpose.

ACKNOWLEDGEMENT:

Do you accept the terms of the preceding License Agreement, Terms of Use, and Terms?

- If you accepted the terms of usage, a new page appears. Populate the required fields on this page. Required fields are marked with an asterisk.

Password Rules

- Your user ID must consist of 7-45 characters. There are no character restrictions.
- Your password must consist of 8-24 characters. Include: alpha-numeric characters, at least one special character, and at least one upper-case letter. Example: **Testing=12**

- Answer three authentication questions. Select a question and enter an answer. You will be prompted to answer these questions if you forget your password. If this happens, questions must be answered exactly as you enter them in these fields; therefore, create answers that are easy for you to answer but difficult for someone else to guess.
- Click **Save**.
Click **Cancel** to exit without completing the registration process.



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* required field

Last Name:*	First Name:*	MI:
<input type="text"/>	<input type="text"/>	<input type="text"/>
E-mail Address:*	Re-enter Email Address:*	
<input type="text"/>	<input type="text"/>	
Phone Number:	Extension:	
<input type="text"/>	<input type="text"/>	
User ID:*	Company:*	
<input type="text"/>	<input type="text"/>	

(7 to 45 alpha-numeric characters)

Passwords should be 8-24 characters long, contain both letters and numbers, an upper-case letter, and a non-alphanumeric character.

Password:*	Re-enter Password:*
<input type="text"/>	<input type="text"/>

Please select three different questions from the options given and provide short answers to them. You will be asked to answer these questions if you forget your Trust Gateway Portal password.

Select Question 1:

Answer Question 1:

(2-50 characters)

Select Question 2:

Answer Question 2:

(2-50 characters)

Select Question 3:

Answer Question 3:

(2-50 characters)

- If you clicked Save after completing steps 1-6, inform your Account Manager that you registered as a new user and would like access to the Client Information Delivery Portal. You must provide your Account Manager ([Carolyn Morrison](#) and assistant [Ryan Brennan](#)) with the first name, last name, and user ID that you used when completing the registration form online. When your registration is processed, you will be notified that you can log on to the system.

Log On

You must log on to the Client Information Delivery system at least once every 90 days to keep your access active.

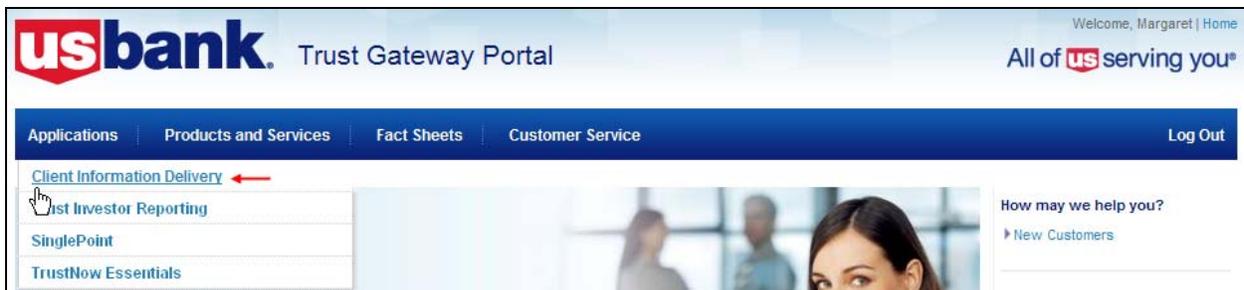
- Launch your browser.
- Navigate to, <https://usbtrustgateway.usbank.com/portal/login.do>. The Login page appears. Save this URL as an internet Favorite for easy access.
- Enter your user ID in the User ID field.
- Enter your password in the Password field.

Note: If you forget your password, click the **Forgot password** hyperlink. You will be prompted to enter your user ID and answer your authentication questions before obtaining a new password. U.S. Bank sends a notice to your e-mail address of record when your password is changed to protect your account from unauthorized access.

- Click **Log In**.



- If you have access to several applications, on the page that appears next, select **Applications** from the menu bar, and then select **Client Information Delivery** from the dropdown list that appears.



The My Accounts page appears. You are now logged on to the Client Information Delivery Portal.

NOTE: You must log on at least once every 90 days to keep your access active.

