

e*PRIMEVEST Online User Guide - Printable Version

Logging into e*PRIMEVEST

If you have received your e*PRIMEVEST password, you simply need to select the **Login button**. On the login page you will be asked to enter your account number and password information.

To activate your account for online access, select the **Activate an Online Account button**

Having Trouble Logging In

- 1) Enter your full 8-digit brokerage account number. This can be found on your new Account Application or your most recent monthly brokerage statement.
- 2) Your password is cAsE sEnSiTiVe. Please make sure your caps lock key is off.
- 3) Upon initial login, a set of disclosures needs to be agreed to prior to accessing your account.

Forget Password Setup Function

If you should forget your password you can setup up your account to ask you two questions from the list with your answers to reset the password.

To set up forget password function simply:

- 1) Select Account Services from the menu bar at the top of the screen
- 2) Select My User Settings from the choices on the left side of the screen
- 3) Select a question from question 1 list
- 4) Answer the question in the Answer 1 box
- 5) Select a question from question 2 list
- 6) Answer the question by selecting the date
- 7) Enter your password and Click save to accept your change

Welcome Page

Choose an account to begin. Select a category from the top menu bar to view your account, build a portfolio, trade, set user settings, or do research. A second menu bar will appear on the left side of the screen to select a specific area to view.

Logging Off

Click the **Log Off** button in the upper right hand of the screen. Whenever you leave your computer we recommend you log off.

Current Account

This is the current account you are viewing, to change to another linked account:

- 1) Click Account Services
- 2) Click Account Selection
- 3) Click the account you wish to see

Get A Quote Box

Enter the symbol you wish to get a delayed quote.

NYSE and AMEX quotes are delayed by at least 20 minutes. All other quotes are delayed by at least 15 minutes.

If you wish to place an order, please check Real-time quotes for the most recent information. The information available on e* PRIMEVEST is obtained from sources believed to be reliable. However, PRIMEVEST Financial Services, Inc. does not warrant the accuracy, completeness, or currency of any third party information available on e* PRIMEVEST.

Scrolling Delayed Ticker

Intraday data provided by S&P Comstock and is delayed at least 20 minutes. Powered by QuoteMedia.

Click Edit Symbols to enter up to 25 symbols you wish to scroll

Click Close to turn off the scrolling ticker. To have the scrolling ticker appear click on the link Turn on Java Ticker.

Online Trading

In accounts activated for online trading, you may place equity and option trades as well as redeem money from your money market account.

You can access the trading features by:

- 1) Select Trading from the top menu bar.
- 2) Select Account Services, go to Positions & Balances and select any of the underlined stock symbols (or hyperlinks) which will bring you directly to the trading screen.

Penny stock **BUY** trades are prohibited. PRIMEVEST recognizes penny stock valued at \$2.00 and under. Customers must contact the Financial Institution or Investment Executive to execute these types of trades.

Redeem Money

To redeem money from your money market:

- 1) Select Account Services
- 2) Select Positions & Balances
- 3) Click on the underlined symbol (or hyperlink) listed under money market funds.

This will automatically bring you to the redemption screen.

Canceling or Modifying Open Orders

Open orders are orders that have not executed, usually because the trade was entered with a limit price and not at the market.

To cancel or modify any open order simply:

- 1) Select Trading or Account Services from the top menu bar
- 2) Select Open Orders
- 3) Select Cancel or Modify

Open orders indicate if the transaction is a buy or a sell, stock symbol and name, quantity and price.

Executed Trades

To view a list of trades executed for today's date:

- 1) Select Trading or Account Services
- 2) Select Executions to view trade's executed today.

Executed trades indicate if the transaction was a buy or sell, stock symbol and name, quantity and price.

Delayed / Real - Time Quotes

All e* PRIMEVEST account holders have access to unlimited 15 – 20 minute delayed quotes. Accounts activated for trading receive 100 free real-time quotes for each executed equity trade done online.

Quotes can be accessed by selecting either Delayed or Real-Time Quotes from the Quotes category. You may also create a quote portfolio from either screen. You may also get a quote from any screen by entering a symbol in the Get a Quote box in the upper left corner.

Research

All e* PRIMEVEST accounts have access to some of the top equity news and research information in the industry which is provided by QuoteMedia.

QuoteMedia information can be found by selecting research from the top menu bar.

QuoteMedia has easy access to:

- **Market Overview**- market overview
- **Commentary** – Cutting edge analysis on the market.
- **Market** – Up to the minute market news and events
- **Quotes** – Need to know the price of a certain stock?
- **Graphs** – Analyze your favorite stocks
- **Reports** – Get the facts about any publicly traded company.
- **Prosearch** – Searching for your next investment opportunity?

Portfolio

The Portfolio lists your securities and calculates your profit and loss.

Securities will only be updated as you purchase them. If you sell a security it will not be automatically removed from the portfolio, you will have to remove it manually. You can update your portfolio entries by clicking on the edit button for the specific security. This will give you the option of updating the security, quantity, purchase price, commission, and date. Once finished, you can SAVE your changes, DELETE the entire line or CANCEL any update you just made (back out without making changes).

Account Services

Account Selection

Choose an account to begin. You must select an account before obtaining a delayed quote, viewing the Account Positions & Balance screen, viewing the Account History screen, viewing the Order Status screen or changing your password.

My User Settings

You can view user settings under Account Services. You can change your password, view number of realtime quotes remaining, set notification method, set up password recovery and view the click on agreements from this page.

Changing e* PRIMEVEST Password

Passwords are cAsE sEnSiTiVe and must be a minimum of 4 characters, or up to a maximum of 10 characters long and can be either alpha, numeric or alphanumeric.

If you have more than one e* PRIMEVEST account, you can assign the same password to each account so you only have to remember one!

To change your password simply:

- 1) Select Account Services from menu bar at the top of the screen
- 2) Select My User Settings from the choices on the left side of the screen
- 3) Enter your desired password in the New Password field
- 4) Re-enter your desired password in the Re-enter New Password field
- 5) Enter your current password in the space provided
- 6) Click Save to change your password

To set up password recovery, refer to the instructions listed under Forget Password Setup. Click on any of the agreement links to view the agreement.

Set notification method

You can receive an email message each time an online order is executed.

- 1) Select Account Services from the menu bar at the top of the screen
- 2) Select My User Settings from the menu bar on the left side of the screen.
- 3) Select Email from the Notification Mode Dropdown Menu
- 4) Enter your email address in the Email Address field
- 5) Enter your current password in the space provided.
- 6) Select Save to accept your change

Real - Time Account Positions and Balances

You can view your current positions and account balances by selecting Positions and Balances under the Account Services category.

The information displayed is updated on a real-time basis. The equity prices listed are updated with a 15 or 20 minute time-delayed quote.

Trade Activity

You are able to view all trading related activity in two locations on e*PRIMEVEST.

You can view trade history for approximately 45 days. To do so simply:

- 1) Select Account Services
- 2) Select Account History.
- 3) Input a time frame to view
- 4) Select Search.

Trade history is updated real-time and indicates if the transaction was a buy or sell, stock symbol and name, quantity, price, net amount due or owed, trade date, settlement date and if the transaction was executed in your cash or margin account.

You can also view trades that executed today under Trading or Account Services and select Executions.

Statements

Statements will be available for 13 months or since the account is open. To view statements select account services, select statements. Click on the month you would like to view. The statements will be printable in PDF format.

FAQ's (Frequently Asked Questions)

Located in the top menu bar, FAQ's offers detailed information on your brokerage account. A list of questions will come up, click on the link to see the answer to the question.

Contact Us

Contact Us is located in the top menu bar and provides information on how to reach us, are hours and mailing address.

Help

Help is located at the top of your screen. Help offers detailed information on how to use the site, including information regarding; connecting to your account, site functionality, trading, and account services. Also wherever you see ?, that means there is content sensitive help about that particular section of e* PRIMEVEST. Just click on the ? to read more information.