CAPE ANN SAVINGS
TRUST & FINANCIAL SERVICES
PLANNING ◇ ADVISING ◇ INVESTING

Notice: Cape Ann Savings Trust & Financial Services Investor Clients New Portal, Coming on Tuesday, August 5th

Your wealth, your way—a new client portal is coming on Tuesday, August 5th.

We have upgraded your client portal for a more engaging and transparent experience. As our valued client, you deserve to be as involved in your wealth journey as you would like to be. To do this, we have evolved our portal into a more interactive place to view your holdings, see transactions and disbursements in real time, and see the full picture of your wealth.

Here's what's new:

- Drill down into account-level and asset-level details to find the exact information you need.
- See your transactions and disbursements in your portal account as they happen in real time.
- Get timely updates and announcements from our team as soon as you log in on the new dashboard.

How to use the new portal

- Log in with your normal portal username and password at https://castrust.accessasc.com. If you need to reset your password, use the "Forgot your password?" option.
- Explore the different sections of the portal and how to use them to stay updated on your accounts.
- Add your client portal as an app on your mobile device using the following instructions:

iPhone or iPad

1. Open Safari and navigate to the website you want to add
2. Tap the Share button, which looks like a square with an arrow pointing out
3. Scroll down and tap Add to Home Screen
4. Choose a name for the shortcut
5. Tap Add

Android

1. Open Chrome and navigate to the website you want to add
2. Tap More to the right of the address bar
3. Tap Add to home screen
4. Choose a name for the shortcut
5. Tap Add

We hope you enjoy this new portal experience, and as always, our team is ready to help you. Please reach out to your Trust Officer at 978-283-7079 if you have any questions. Thank you for your partnership!