



# **GWAccess Quick Start Guide**

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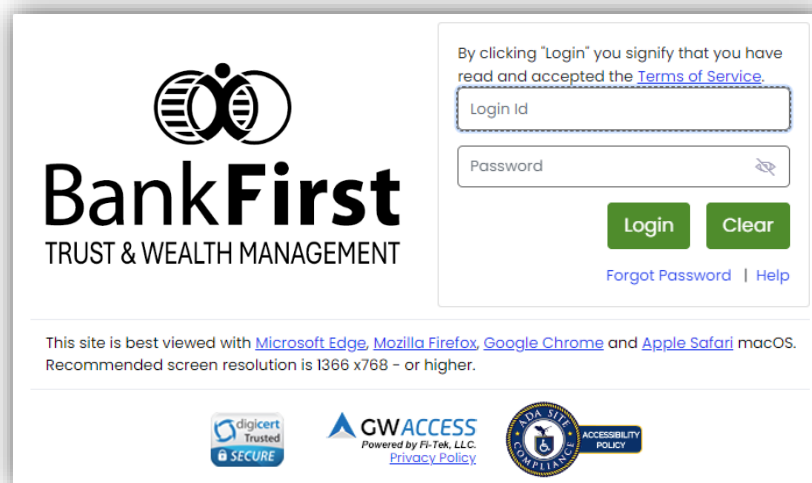
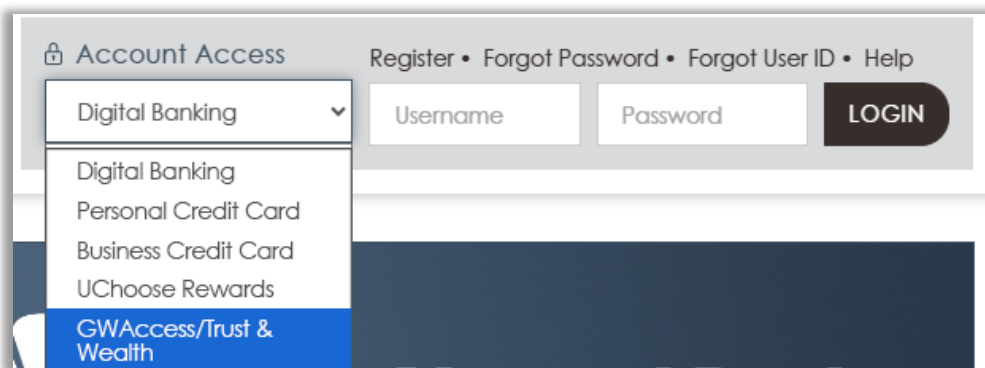
# GETTING STARTED WITH GLOBAL WEALTH ACCESS

Welcome! This guide will walk you through the simple steps to log in and set up your Global Wealth Access (GWAcess) account for the first time.

## Logging In

To log into your GWAcess account, follow these steps:

1. Navigate to [bankfirst.com](http://bankfirst.com).
2. Look for the “Account Access” drop down menu and select **GWAcess/Trust & Wealth**.
3. On the login screen, enter your unique **Login ID** and **Password**, then click **Login**.



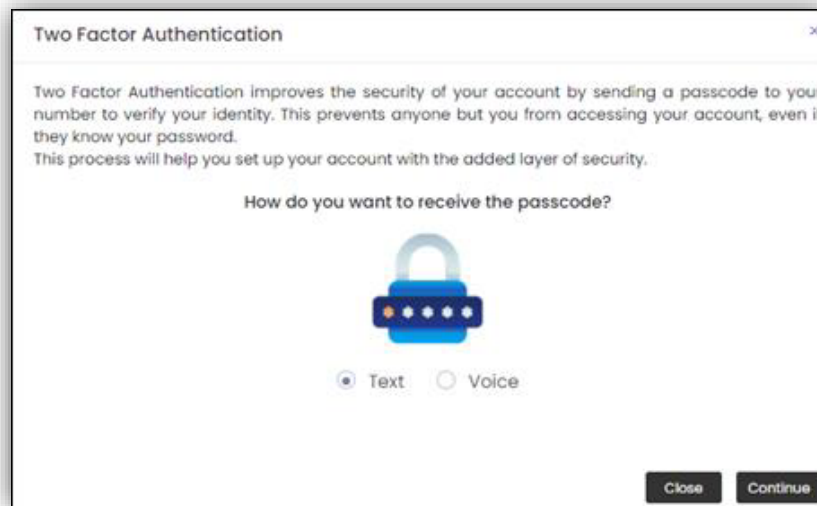
## Enhanced Security with Two-Factor Authentication

For your protection, we require two-factor authentication (2FA) at every login. This adds an extra layer of security by sending a one-time passcode to your registered phone number.

### First-Time Setup:

The first time you log in, you will need to register your phone number for 2FA.

1. Select how you would like to receive your passcode: either by **Text** or **Voice call**.
2. Click **Continue**.
3. Enter your phone number in the provided field and re-enter it to confirm. Dashes and spaces are not required.
4. Select **Continue**. A 6-digit passcode will be sent to your phone.
5. Enter the 6-digit passcode you received. If you don't receive it, click the **Resend Passcode** button to generate a new one.
6. Click **Continue**.
7. The system will confirm your setup is complete. Click **Continue** again to proceed to your GWAccess dashboard.



**Note:** Once your phone number is registered, you will see it partially displayed on the login screen for future logins. When logging in again, simply select your registered number, enter the passcode you receive, and click **Continue** to access the site.

## Changing Your Temporary Password

If this is your first time logging in, you will be required to change your temporary password for security. You will be automatically redirected to the "Force Password Change" screen.

**Follow these steps to create your new, permanent password:**

1. Enter the temporary password you were initially provided in the **Current Password** box.
2. Enter your new password in the **New Password** box.
3. Re-enter the new password in the **Confirm Password** box to ensure it's correct.
4. Click **Save**.

You will then be directed to the main GWAccess dashboard.

**Force Password Change** [Logout](#)

**Why I am being asked to change my password?**

- Your assigned password is temporary.
- Your password has expired

Note: Current Password, New Password, and Confirm fields are mandatory.

**Password Change**

Login Name:

Current Password\*:

New Password\*:

Confirm Password\*:

[Save](#) [Clear](#)

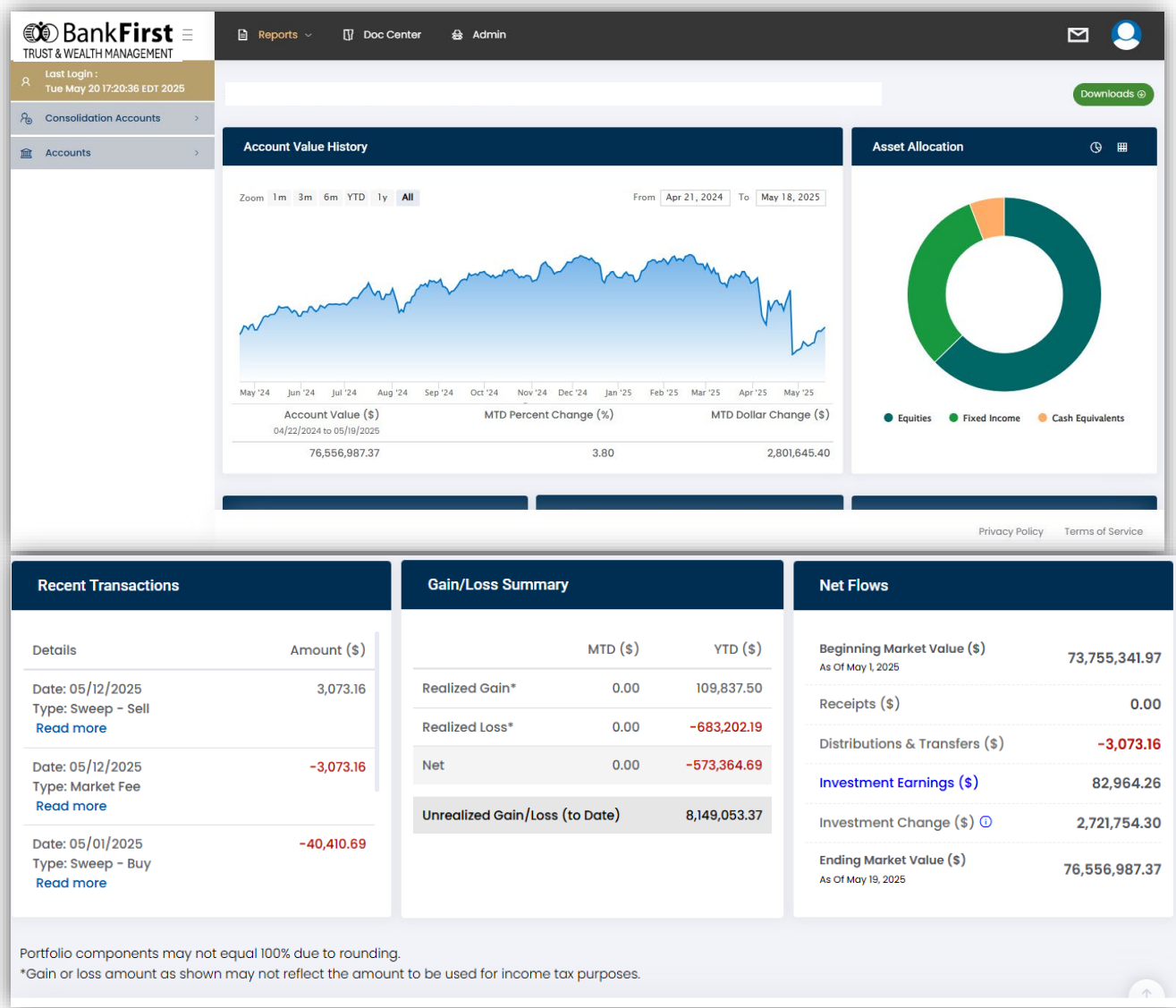
# GWACCESS NAVIGATION GUIDE

When you log into Global Wealth Access (GWA), you'll land on the main Client Profile screen. This is your central hub for managing your accounts.

## Navigating the Top of Your Screen

In the top right corner, you'll see two icons:

- **Envelope Icon:** Click this to send a secure message directly to your administrator through the GWA platform.
- **Profile Icon:** This is where you can manage your personal information. Here, you can change your password, update your phone number and email address, and find answers to frequently asked questions (FAQs).



## Viewing Your Accounts

On the left side of your screen, you'll find a list of all your available accounts. This includes any **consolidated accounts** you've created, as well as any other **Trust or Investment accounts** that have online access.

If you have multiple accounts and would like to view them together, you can create a consolidated view. To do this, simply connect your individual accounts to your user profile.

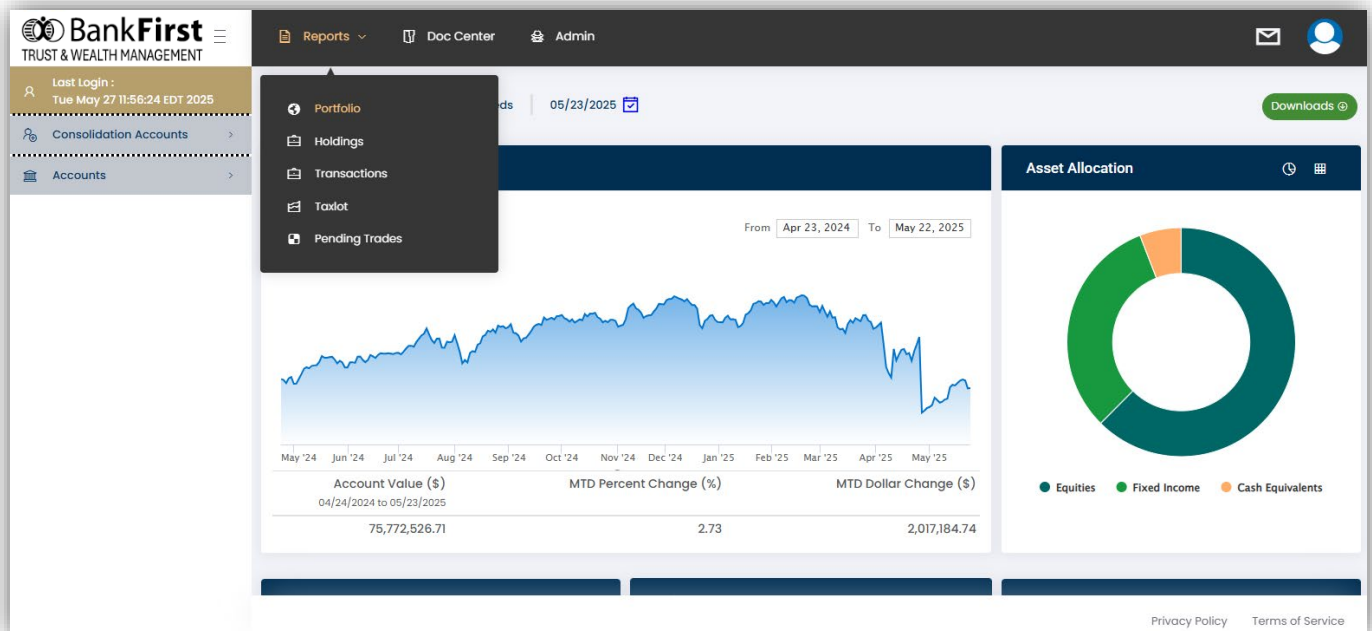
## Finding Your Reports and Documents

The GWAccess platform gives you quick access to important reports and documents.

### Reports

Click on the Reports section to view a variety of reports about your accounts. Here's what you'll find:

- **Holdings:** See a list of all current holdings in your account.
- **Transactions:** View a complete history of all transactions. You can filter this list by transaction type, time period, or specific dates to find exactly what you're looking for.
- **Pending Trades:** Check on any trades that are currently pending.
- **Tax Lots:** Review your tax lot information.







## Doc Center

The **Doc Center** is your secure location for important documents. This is where you can access your electronic statements and other documents that have been uploaded for you.

