

Account Services Manager (ASM) and Wealth Services Enhancements at a Glance

Introduction

Effective February 17, 2022, we are updating City National Account Services Manager (ASM) and online wealth services (Investment Account View, Portfolio Review, Online Brokerage and Client Initiated Funds Transfer) to provide clients with a more secure, updated service platform and single sign-on access through our online banking portal, City National Online. This update provides improved user experience and the convenience of **one sign-on for multiple services**. Here is a look at the changes.

Cloud-Based Hosting

In addition to an upgraded look and feel, these services will now be hosted in the cloud, offering greater security, significant reduction in scheduled maintenance windows affecting your business and the ability to perform future upgrades efficiently.

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Before **After**

Login through the Services Platform

Login through City National Online (CNO) Portal

	For account and other banking support, call	For web site technical support Mon - Fri 6:30am-5:00pm PT, call
Portfolio Review	800-708-8881	877-442-4262
Financial Summary	800-708-8881	877-442-4262
IDA Sign on	800-660-6282	877-442-4262
Investment Account View	800-708-8881	877-442-4262
Money Market Transfer	800-280-1464	877-442-4262
Brokerage	800-280-1464	877-707-4262
Retirement Services	800-660-6282	877-442-4262
eCityRec	1-800-599-0020	877-442-4262
Plan Sponsor Data Transfer	800-660-6282	800-660-6282
Online Loan Transfer	800-700-6901	877-442-4262
Account Services Manager	800-599-0020	877-442-4262

SIGN IN TO City National Online

City National Online

Business Suite™

Business Essentials

User ID

Password

Remember my User ID

SIGN IN

[Forgot User ID?](#)
[Forgot Password?](#)

How You Benefit and What You'll Do

CNO Benefits:

- Improved security
- **Single sign-on** to multiple treasury services on CNO with one User Name/password
 - City National Business Suite® and Business Essentials
 - Business Bill Pay
 - ACH Positive Pay
 - Account Reconciliation Processing
 - E-Deposit
 - Additional services will be added to CNO in 2022
- More reliable platform

Steps You'll Take:

1. Enter your User Name and Password, then click **Sign In**.
2. Choose from Text Message, Email or Voice Message to receive a one-time Verification Code.
3. When you receive the code, enter in the field provided.
4. Choose **Account Services Manage** from the menu of your available services.

Before **After**

Home Page Clutter of Links and Buttons

CNB.COM | CONTACT US | LOCATIONS S P 7/3/2014 SIGN OUT

CITY NATIONAL BANK
The way up.

TALK WITH US: (800) 599-0020

ACCOUNT SERVICES MANAGER

OVERVIEW AND STATUS View: My Requests My Company's Requests

Overview and Status
Request New Accounts
Add Services
Delete Services
Forms

Request#	Name	Status	Updated On	Updated By
4000	Liz Taylor	Submitted	1/24/2014	Mark etest28
4921	Bankruptcy test	Submitted	4/17/2014	S P
4936	Bank Test	Submitted	4/17/2014	S P
51404	Johnson	Submitted	7/3/2014	S P
51410	Top Form Business Solutions	Submitted	7/3/2014	S P
Johnson Account (199911139) Johnson Operations (199911140) Johnson Payroll (199911141)				
50507	KG Test 2014 05 14 001	Processed	5/21/2014	Mark etest28
4225	TEST Aleks	System Cancelled	6/17/2014	Mark etest28
4939	test dup name	System Cancelled	6/17/2014	S P

Upgraded Look & Feel

Overview and Status Request New Accounts Add Services Delete Services Forms

Overview and Status

My Requests My Company's Requests Search

Request #	Name	Status	Last Updated Date	Last Updated By
> 55415	test 2 021621	Processed	02/22/2021	Gz h
> 55454	Add Services test2 021721	Processed	04/21/2021	Gz h
> 55703	Delete Services 030321	Processed	04/21/2021	Gz h
> 54032	test - bankruptcy 120420	Cancelled	01/08/2021	Gz h
> 54263	Approver Test	Cancelled	01/08/2021	Mz h
> 54536		Cancelled	01/11/2021	Gz h
> 54608	Test functionality	Cancelled	01/12/2021	Gz h
> 54614	TestSaveFunction	Cancelled	01/11/2021	Gz h
> 54629		Cancelled	01/08/2021	Gz h
> 55649	ABC Acct 022521	Cancelled	02/25/2021	Gz h

1 - 10 of 64 items

ADD OWNERS AND SIGNERS

+ ADD COMPANY OR TRUST - Establish Companies/Businesses or Trusts using an EIN.

- ADD INDIVIDUALS - Establish Individuals, Company/Business or Trust Names using a Non-EIN.

Enter required individual's name and click Add.

* Required fields

* First Name Middle Name * Last Name * Tax ID Type * Tax ID * New or Existing

Jane Social Security N 123-44-4444 Existing

Also Known As/Trust/DBA Names Professionally Known As

+ ADD

+ THIRD PARTY'S AGENT SIGNER(S)

CONTINUE | CANCEL

Add Owners and Signers

Add Company or Trust Establish Companies/Businesses or Trusts using an EIN.

Add Individual Establish Individuals, Companies/Businesses or Trusts using a Non-EIN.

Enter required individual's name and click Done.

First Name Middle Name Last Name Tax ID Type Tax ID New/Existing

Bob Smith Social Security Num 111-11-1111 New

Also Known As/Trust/DBA Names Professionally Known As

Add Cancel

Third Party's Agent Signer(s)

Done Cancel

ACCOUNTS TRANSFER Test Request - #74189

Please click "SAVE DRAFT" or "CONTINUE" before leaving this page or the information entered will be lost.

*** Required fields**

Below are the new accounts you have identified for account transfer services. Add any other existing accounts that should be linked to the new account(s) below by clicking on the "Add" link.

Account	New or Existing
LLC Business Checking / Company - Test Company LLC	New
Personal Individual Checking - Jane Test	New

+ Add existing accounts one at a time

TRANSFER SETUP

Unrestricted Accounts Allow unrestricted transfers to and from accounts. +

LLC Business Checking / Company - Test Company LLC
Personal Individual Checking - Jane Test

Restricted Accounts Only allow transfers between individual accounts. ?

No restricted accounts specified.

+ Add transfer restrictions one at a time

TRANSFER REQUEST INFORMATION

Attach file with a list of transfer accounts/restrictions/instructions. +

Please enter any additional instructions that you would like to communicate to City National Bank

Enter Text...

Characters remaining: 1000

Account Transfer Test Request - #74189

Please click "SAVE DRAFT" or "CONTINUE" before leaving this page or the information entered will be lost.

Below are the new accounts you have identified for account transfer services. Add any other existing accounts that should be linked to the new account(s) below by clicking on the "Add" link.

Account	New or Existing
LLC Business Checking / Company - Test Company LLC	New
Personal Individual Checking - Jane Signer	New

+ Add existing accounts one at a time

Transfer Setup

Unrestricted Accounts | Allow unrestricted transfers to and from these accounts. ?

LLC Business Checking / Company - Test Company LLC
Personal Individual Checking - Jane Signer

Restricted Accounts | Only allow transfers between these individual accounts. ?

No restricted accounts specified.

+ Add transfer restrictions one at a time

Attachments

Transfer Request Information

Please enter any additional instructions that you would like to communicate to City National Bank

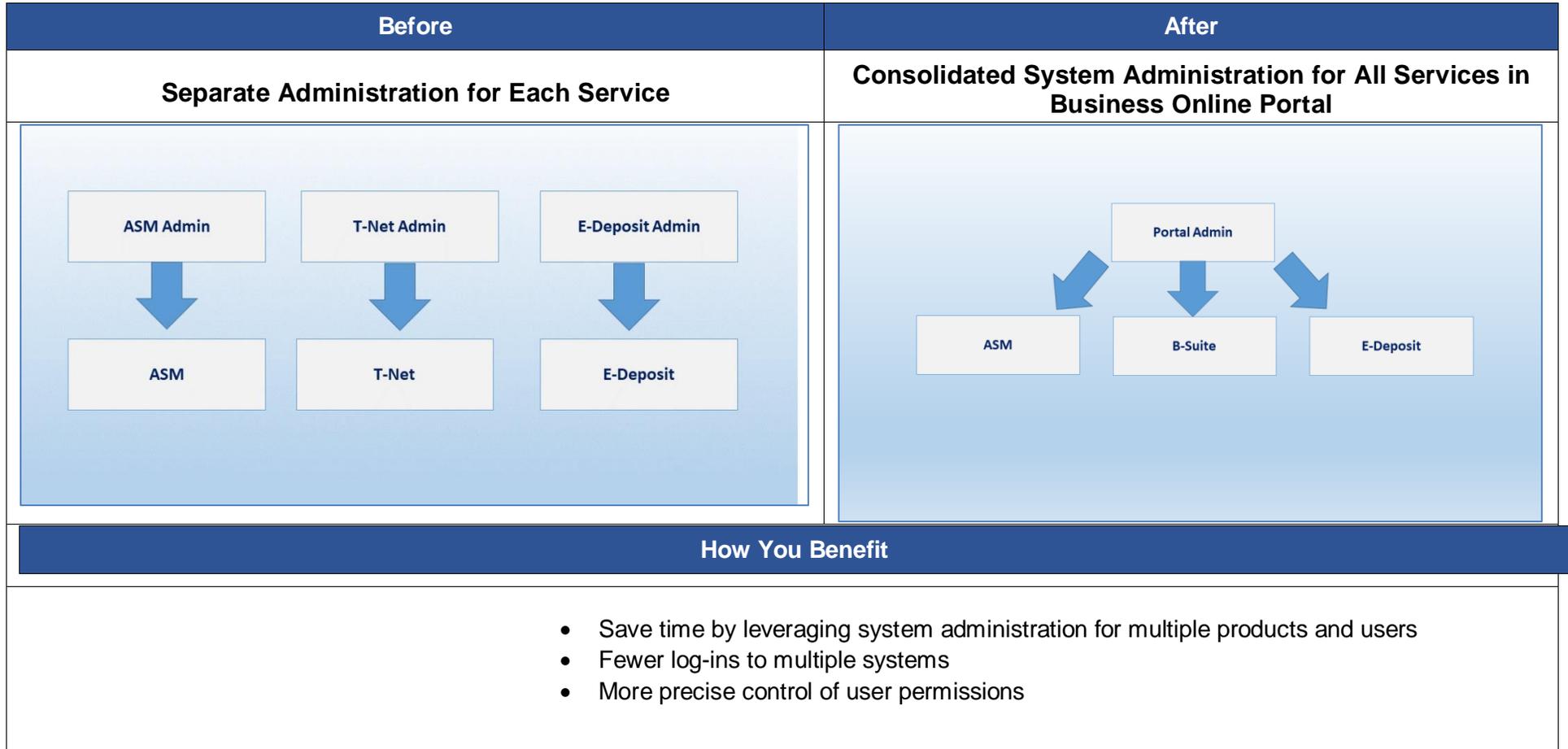
Enter Text...

Characters remaining: 1000

Save Draft Continue

How You Benefit

- Minimal learning curve for existing ASM users
- Cleaner interface
- Consistent with other City National online services and platforms



Before **After**

Login through the Services Platform

Login through City National Online (CNO) Portal

Client Support Numbers

	For account and other banking support, call	For web site technical support Mon - Fri 6:30am-5:00pm PT, call
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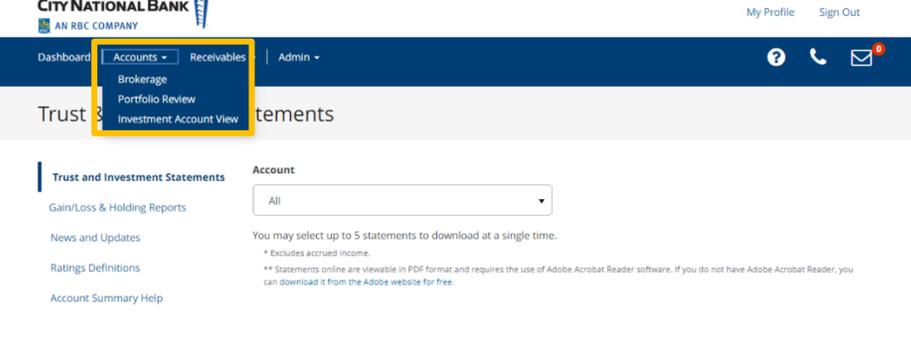
How You Benefit and What You'll Do

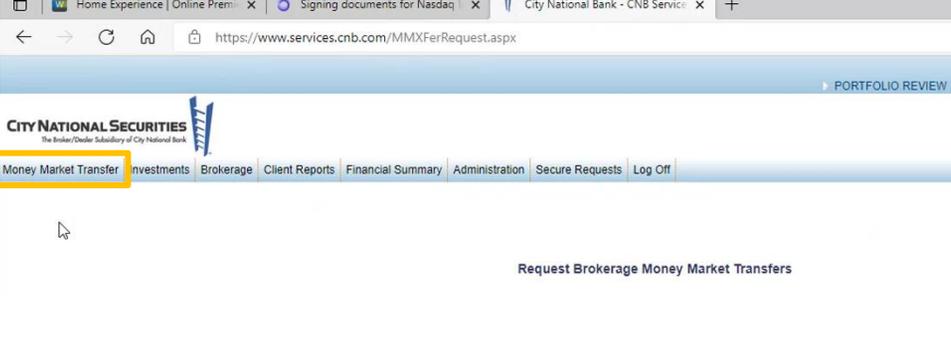
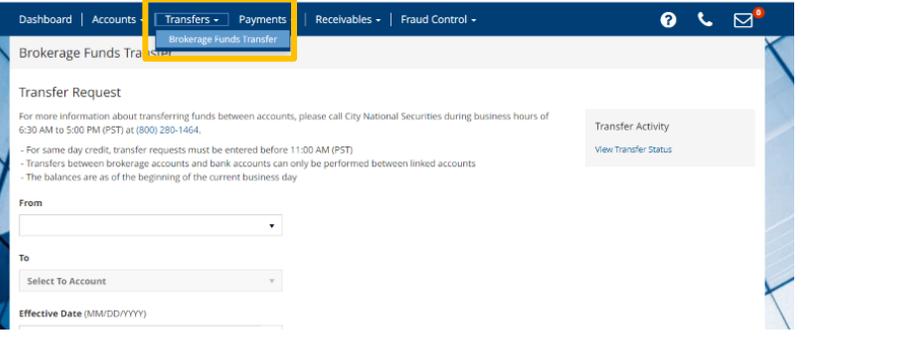
CNO Benefits:

- Improved security
- More reliable platform

New steps you'll take:

1. Visit cnb.com.
2. Select Sign In in the upper right-hand corner.
3. Enter your User Name and Password, then click **Sign In**.
4. Choose from Text Message, Email or Voice Message to receive a one-time Verification Code.
5. When you receive the code, enter in the field provided.
6. Choose your preferred service from the menu of your available services.

Before	After
<p>Access Investment Account View and Brokerage at the top menu</p>	<p>Access Brokerage, Portfolio Review or Investment Account View by clicking Accounts on the top menu</p>
	

Before	After
<p>Access Money Market Transfer at the top menu</p>	<p>Access Money Market Transfer by clicking Transfers > Brokerage Funds Transfer on the top menu</p>
	

How You Benefit

- Improved user experience with more modern, easy to read screens

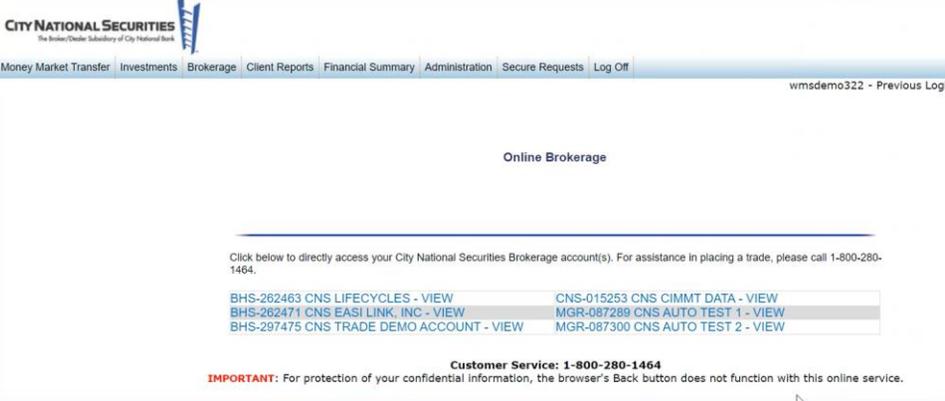
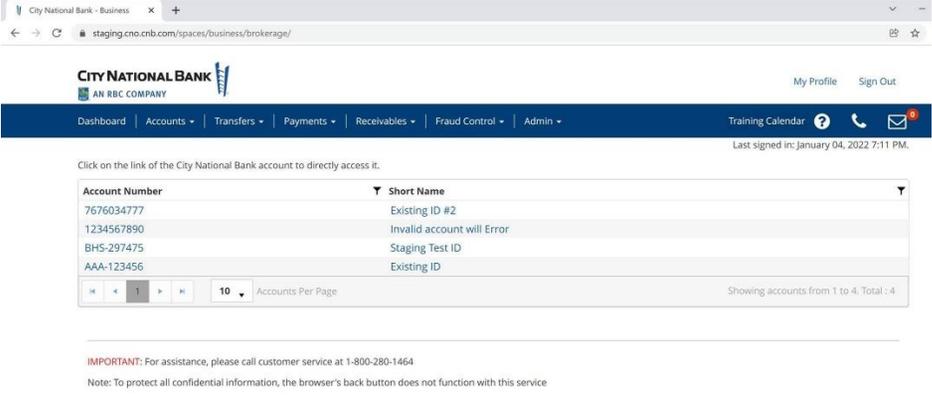
Investment Account Statements View

Before	After																																																																																																		
Outdated user experience	Clean, succinct view of Investment Statements																																																																																																		
<p style="text-align: center;">Investment Account View</p> <hr/> <p style="text-align: center;"> Quarterly Newsletter Rating Definitions Portfolio Review Download Holdings Download Gain/Loss Help </p> <p>Select Account: All and Statement Date: 3/31/2021 Go</p> <p>Click on the Statement Date to view the PDF statement.</p> <table border="1"> <thead> <tr> <th>Account Number</th> <th>Account Name</th> <th>Market Value As Of 4/29/2021 <i>(Excludes Accrued Income)</i></th> <th>Statement Date</th> <th>Period Covered</th> <th>Relationship Contact</th> </tr> </thead> <tbody> <tr><td>177339100</td><td>CNR CORPORATE BOND FUND</td><td>\$128,967,886.89</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>177339100 - Consolidated</td><td>CNR CORPORATE BOND FUND</td><td>\$163,154,219.59</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>177340100</td><td>CNR GOVERNMENT BOND FUND</td><td>\$34,186,332.70</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>22334455 - Consolidated</td><td>BSG TEST ACCOUNT</td><td>\$1,763,858.25</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>33445577 - Consolidated</td><td>SAMPLE ACCOUNT 1</td><td>\$87,787,809.96</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>33445577 - Consolidated</td><td>SAMPLE ACCOUNT 1</td><td>\$106,927,470.19</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>33445577</td><td>SAMPLE ACCOUNT 1</td><td>\$48,739,769.39</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>44556677</td><td>SAMPLE ACCOUNT 2</td><td>\$39,048,040.57</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>55667788</td><td>SAMPLE ACCOUNT 3</td><td>\$30,255,631.38</td><td>3/31/2021</td><td>Quarterly</td><td></td></tr> <tr><td>66778899</td><td>SAMPLE ACCOUNT 4</td><td>\$6,149,307.30</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>66778899 - Consolidated</td><td>SAMPLE ACCOUNT 4</td><td>\$45,197,347.87</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> <tr><td>66778899 - Consolidated</td><td>SAMPLE ACCOUNT 4</td><td>\$45,197,347.87</td><td>3/31/2021</td><td>Monthly</td><td></td></tr> </tbody> </table>	Account Number	Account Name	Market Value As Of 4/29/2021 <i>(Excludes Accrued Income)</i>	Statement Date	Period Covered	Relationship Contact	177339100	CNR CORPORATE BOND FUND	\$128,967,886.89	3/31/2021	Monthly		177339100 - Consolidated	CNR CORPORATE BOND FUND	\$163,154,219.59	3/31/2021	Monthly		177340100	CNR GOVERNMENT BOND FUND	\$34,186,332.70	3/31/2021	Monthly		22334455 - Consolidated	BSG TEST ACCOUNT	\$1,763,858.25	3/31/2021	Monthly		33445577 - Consolidated	SAMPLE ACCOUNT 1	\$87,787,809.96	3/31/2021	Monthly		33445577 - Consolidated	SAMPLE ACCOUNT 1	\$106,927,470.19	3/31/2021	Monthly		33445577	SAMPLE ACCOUNT 1	\$48,739,769.39	3/31/2021	Monthly		44556677	SAMPLE ACCOUNT 2	\$39,048,040.57	3/31/2021	Monthly		55667788	SAMPLE ACCOUNT 3	\$30,255,631.38	3/31/2021	Quarterly		66778899	SAMPLE ACCOUNT 4	\$6,149,307.30	3/31/2021	Monthly		66778899 - Consolidated	SAMPLE ACCOUNT 4	\$45,197,347.87	3/31/2021	Monthly		66778899 - Consolidated	SAMPLE ACCOUNT 4	\$45,197,347.87	3/31/2021	Monthly		<div style="display: flex; justify-content: space-between; align-items: center;"> My Profile Sign Out </div> <div style="background-color: #004a87; color: white; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> Dashboard Accounts - Admin - </div> <p style="text-align: right; font-size: small;">Last signed in: December 09, 2021 5:35 PM.</p> <h3 style="text-align: center;">Trust & Investment Statements</h3> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Trust and Investment Statements Account</p> <p>Gain/Loss & Holding Reports</p> <p>News and Updates</p> <p>Rating Definitions</p> <p>Account Summary Help</p> </div> <p>You may select up to 5 statements to download at a single time.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>▼ 2017 Statements</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Statement Date</th> <th>Number</th> <th>Name</th> <th>Period Covered</th> <th>Relationship Contact</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 11/30/2017</td> <td>38205820 - Consolidated</td> <td>GEORGE & SHIRLEY CARDNIS TRUST 174-0</td> <td>Monthly</td> <td>SAMANTHA DIVALENTINO (212) 207-6812</td> </tr> <tr> <td><input type="checkbox"/> 10/31/2017</td> <td>38205820 - Consolidated</td> <td>GEORGE & SHIRLEY CARDNIS TRUST 174-0</td> <td>Monthly</td> <td>SAMANTHA DIVALENTINO (212) 207-6812</td> </tr> <tr> <td><input type="checkbox"/> 09/30/2017</td> <td>00558001</td> <td>MT SINAI MEMORIAL PARK</td> <td>Quarterly</td> <td>FAITH WHITMAN/JENN BAUGH (213) 673-8899</td> </tr> </tbody> </table> </div>	Statement Date	Number	Name	Period Covered	Relationship Contact	<input type="checkbox"/> 11/30/2017	38205820 - Consolidated	GEORGE & SHIRLEY CARDNIS TRUST 174-0	Monthly	SAMANTHA DIVALENTINO (212) 207-6812	<input type="checkbox"/> 10/31/2017	38205820 - Consolidated	GEORGE & SHIRLEY CARDNIS TRUST 174-0	Monthly	SAMANTHA DIVALENTINO (212) 207-6812	<input type="checkbox"/> 09/30/2017	00558001	MT SINAI MEMORIAL PARK	Quarterly	FAITH WHITMAN/JENN BAUGH (213) 673-8899
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Online Portfolio Review

Before	After																		
<p>To access Portfolio Review, users must first click Investments then Portfolio Review</p> <p>Investment Account View</p> <p>Quarterly Newsletter Rating Definitions Portfolio Review Download Holdings Download Gain/Loss Help</p> <p>Select Account: All and Statement Date: 3/31/2021 Go</p> <p>Click on the Statement Date to view the PDF statement.</p> <table border="1"> <thead> <tr> <th>Account Number</th> <th>Account Name</th> <th>Market Value As Of 4/29/2021 <i>(Excludes Accrued Income)</i></th> <th>Statement Date</th> <th>Period Covered</th> <th>Relationship Contact</th> </tr> </thead> <tbody> <tr> <td>177339100 - Consolidated</td> <td>CNR CORPORATE BOND FUND</td> <td>\$163,154,219.59</td> <td>3/31/2021</td> <td>Monthly</td> <td></td> </tr> <tr> <td>177339100</td> <td>CNR CORPORATE BOND FUND</td> <td>\$128,967,886.89</td> <td>3/31/2021</td> <td>Monthly</td> <td></td> </tr> </tbody> </table>	Account Number	Account Name	Market Value As Of 4/29/2021 <i>(Excludes Accrued Income)</i>	Statement Date	Period Covered	Relationship Contact	177339100 - Consolidated	CNR CORPORATE BOND FUND	\$163,154,219.59	3/31/2021	Monthly		177339100	CNR CORPORATE BOND FUND	\$128,967,886.89	3/31/2021	Monthly		<p>Access Portfolio Review directly from the top menu My Accounts > Portfolio Review</p>
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How You Benefit																			
<ul style="list-style-type: none"> • Improved user experience with more modern, easy to read screens. • Less clicks required to launch Portfolio Review. • The downstream system you're taken to after selecting your account number is still the same. 																			

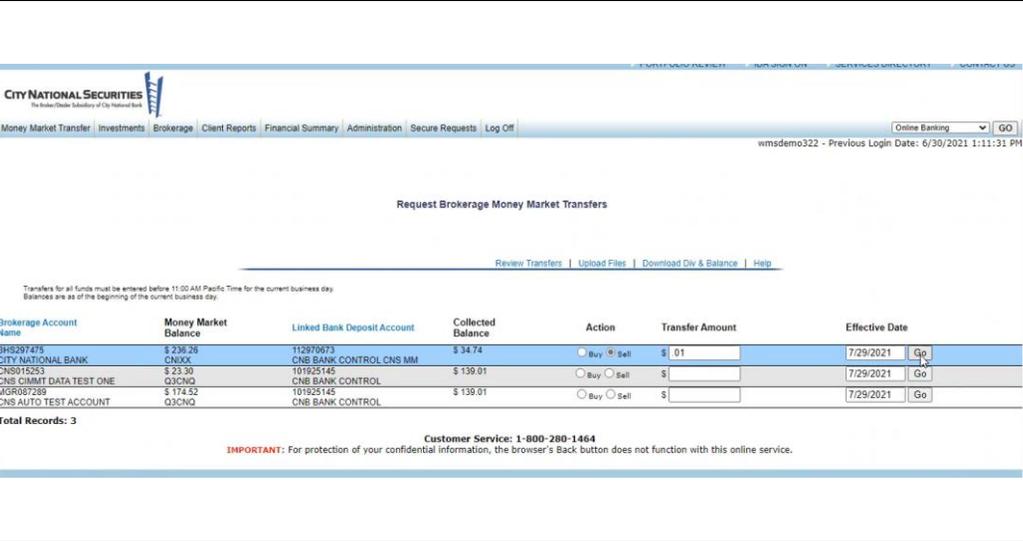
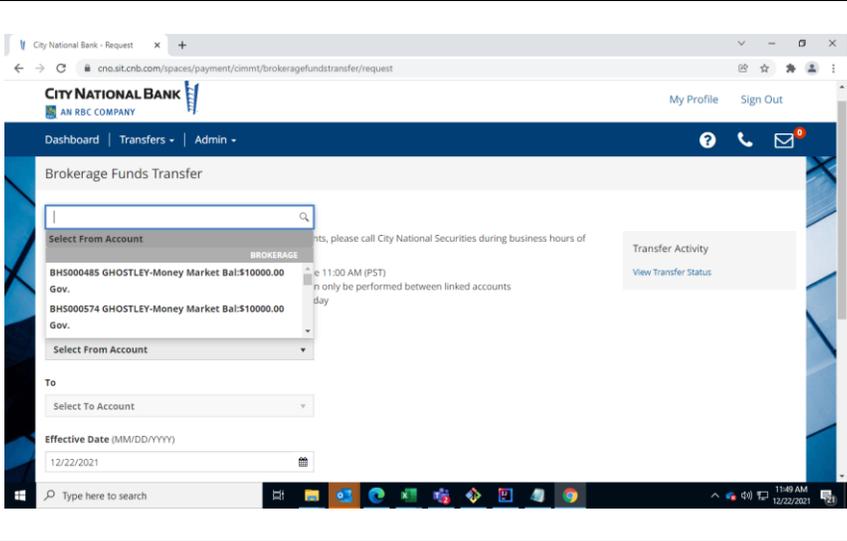
Online Brokerage

Before	After
<p align="center">Outdated, unclear view of Brokerage Accounts</p>	<p align="center">Improved user interface with filtering and increased number of accounts per page</p>
	

How You Benefit

- Easier to view and select accounts
- Filtering capability allows user to quickly find accounts that meet certain criteria
- Increased maximum accounts per page to 250 to reduce pagination
- The downstream system you're taken to after selecting your account number is still the same.

Client Initiated Funds Transfer

Before	After																												
To transfer funds, user would select 'Buy' or 'Sell'	To transfer funds, user can select accounts to move money 'To'/'From'																												
 <p>Request Brokerage Money Market Transfers</p> <p>Transfers for all funds must be entered before 11:00 AM Pacific Time for the current business day. Balances are as of the beginning of the current business day.</p> <table border="1"> <thead> <tr> <th>Brokerage Account Name</th> <th>Money Market Balance</th> <th>Linked Bank Deposit Account</th> <th>Collected Balance</th> <th>Action</th> <th>Transfer Amount</th> <th>Effective Date</th> </tr> </thead> <tbody> <tr> <td>BHS297475 CITY NATIONAL BANK</td> <td>\$ 236.28 CNDXK</td> <td>112976973 CNB BANK CONTROL CNS MM</td> <td>\$ 34.74</td> <td><input checked="" type="radio"/> Buy <input type="radio"/> Sell</td> <td>\$ 01</td> <td>7/29/2021 Go</td> </tr> <tr> <td>CNS015253 CNS CIMMT DATA TEST ONE</td> <td>\$ 23.30 Q3CND</td> <td>101925145 CNB BANK CONTROL</td> <td>\$ 139.01</td> <td><input type="radio"/> Buy <input type="radio"/> Sell</td> <td>\$</td> <td>7/29/2021 Go</td> </tr> <tr> <td>MGR087289 CNS ALTO TEST ACCOUNT</td> <td>\$ 174.52 Q3CND</td> <td>101925145 CNB BANK CONTROL</td> <td>\$ 139.01</td> <td><input type="radio"/> Buy <input type="radio"/> Sell</td> <td>\$</td> <td>7/29/2021 Go</td> </tr> </tbody> </table> <p>Total Records: 3</p> <p>Customer Service: 1-800-280-1464 IMPORTANT: For protection of your confidential information, the browser's Back button does not function with this online service.</p>	Brokerage Account Name	Money Market Balance	Linked Bank Deposit Account	Collected Balance	Action	Transfer Amount	Effective Date	BHS297475 CITY NATIONAL BANK	\$ 236.28 CNDXK	112976973 CNB BANK CONTROL CNS MM	\$ 34.74	<input checked="" type="radio"/> Buy <input type="radio"/> Sell	\$ 01	7/29/2021 Go	CNS015253 CNS CIMMT DATA TEST ONE	\$ 23.30 Q3CND	101925145 CNB BANK CONTROL	\$ 139.01	<input type="radio"/> Buy <input type="radio"/> Sell	\$	7/29/2021 Go	MGR087289 CNS ALTO TEST ACCOUNT	\$ 174.52 Q3CND	101925145 CNB BANK CONTROL	\$ 139.01	<input type="radio"/> Buy <input type="radio"/> Sell	\$	7/29/2021 Go	 <p>Brokerage Funds Transfer</p> <p>Select From Account</p> <p>Select To Account</p> <p>Effective Date (MM/DD/YYYY) 12/22/2021</p>
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<h3>How You Benefit</h3> <ul style="list-style-type: none"> • Improved user experience with more modern, easy to read screens • Clearer verbiage - Transferring 'From' and 'To' accounts compared to 'Buy'/'Sell' • New search functionality added to easily select which accounts to transfer to and from 																													