

Multi-Factor Authentication

User Guide



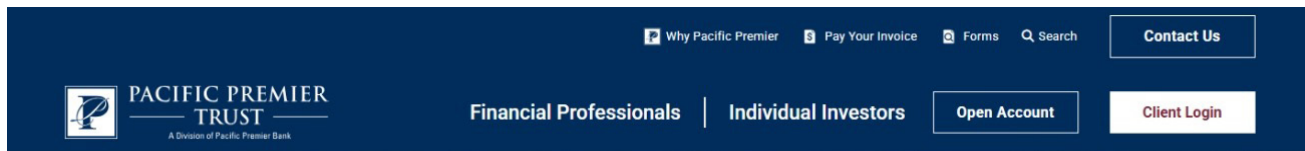
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User Self-Registration

If you have not previously created online credentials, you will need to register in order to access your account.

To register, visit the Pacific Premier Trust homepage and click the “Client Login” button in the main navigation.



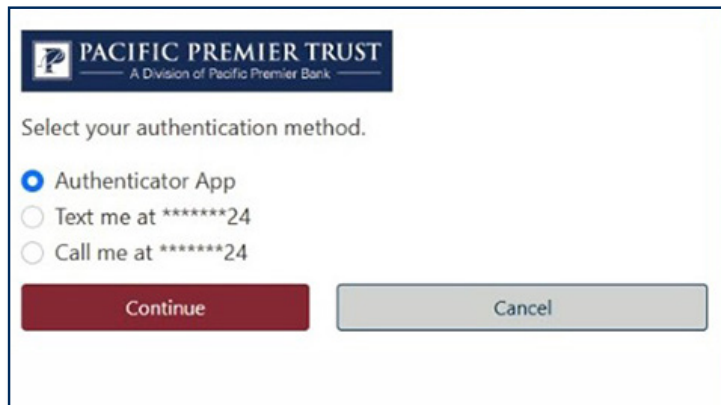
Once you see the screen below, click “Register for Online Access”

Note: If this is your first time registering, DO NOT type a User ID or Password. You will be prompted to create a user ID and password later in the registration process.

The image shows the login and registration page of the Pacific Premier Trust website. At the top is the logo. Below it are two input fields: "User ID" and "Password". To the right of each field is a link: "Forgot User ID" and "Forgot Password". Below the input fields are two buttons: "Log In" (dark red) and "Edit Security Profile" (grey). At the bottom is a large grey button labeled "Register for Online Access", which is pointed to by a red arrow. Below the buttons is a warning message: "Warning: This is a proprietary network exclusively for authorized users. The system is to be used only by authorized users, and by continuing to use the system, the user represents that he/she is an authorized user. Be advised that all rights to the protection of confidential and proprietary information will be aggressively enforced. All unauthorized access or access attempts may result in criminal investigation and prosecution."

During registration, you will be prompted to enter a valid email address. You will then receive an email from **pacificpremiertrust-noreply@seic.com** with a link to complete the registration. Once you select “Complete My Registration”, a new browser window will appear. You will be asked to select your authentication method with either a text message or a phone call from the number on file.

User Self-Registration (cont.)

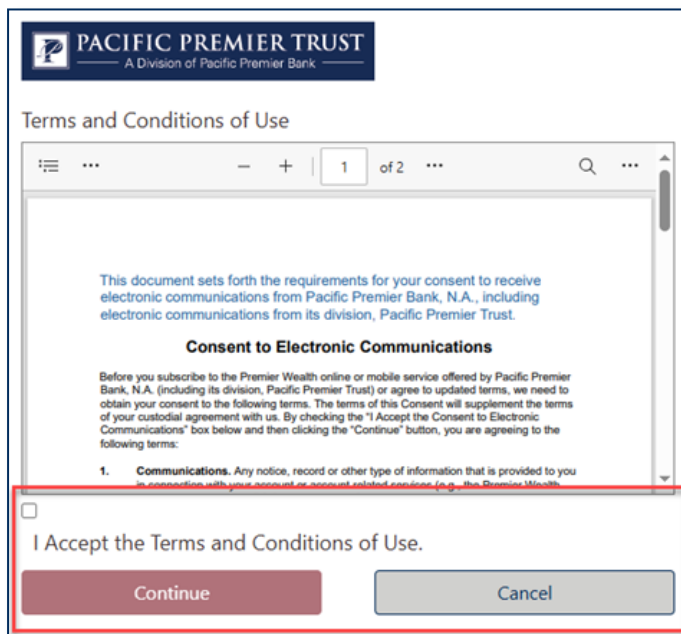


The screenshot shows the Pacific Premier Trust logo at the top, followed by the text "Select your authentication method." Below this, there are three radio button options: "Authenticator App" (which is selected), "Text me at *****24", and "Call me at *****24". At the bottom, there are two buttons: "Continue" in a red box and "Cancel" in a grey box.

Once a method is selected, you will receive a six-digit code to enter.

Note: If you enter an incorrect code three times, you will be locked out for 30 minutes; however, you can try a different form of authentication, such as an Authenticator Application. An Authenticator Application is a third-party app that generates a six-digit PIN required to complete your Pacific Premier Trust registration. To set it up, simply follow the on-screen instructions. You will scan a QR code provided to establish the Authenticator Application (see page 4 to learn more about the Authenticator Application).

After entering the six-digit code, you will be presented with Terms and Conditions. You must accept them before proceeding to the login step.




The screenshot shows the Pacific Premier Trust logo at the top, followed by the title "Terms and Conditions of Use". Below the title is a scrollable area containing the following text: "This document sets forth the requirements for your consent to receive electronic communications from Pacific Premier Bank, N.A., including electronic communications from its division, Pacific Premier Trust." followed by "Consent to Electronic Communications". Below this, there is a paragraph of text explaining the terms of the consent. At the bottom of the scrollable area, there is a red box containing a checkbox and the text "I Accept the Terms and Conditions of Use." Below the red box are two buttons: "Continue" in a red box and "Cancel" in a grey box.


User Self-Registration (cont.)

You will then be asked to create a password that you will use to log in. The password must meet the following parameters:

1. Length must be a minimum of 8 characters and must not be greater than 100 characters
2. Must contain at least three of the following four elements:
 - a. An upper-case letter
 - b. A lower-case letter
 - c. A number
 - d. A special character, such as "!", "@", "\$", "&" etc.

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Create your password




Reenter your password

Continue Cancel


User Self-Registration (cont.)

You will then be given the option to set up an Authenticator Application. This is a third-party app that generates a six-digit PIN required to complete your Pacific Premier Trust registration. To set up an Authenticator Application, simply follow the on-screen instructions. You will scan a QR code provided to establish the Authenticator Application.



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[< Security Profile](#)
To pair your authenticator application to your account, open the application and enter this key:
IM7KOTJWDU6HIQN37BGLJGUGUCIKRRRX

Or scan the following QR code through your Authentication App (not your camera):


Enter the PIN that has been Generated.

Continue


Cancel

Initial Login for Existing Users

For your first login after registration, you will enter your selected User ID and Password, which will generate an email that will be sent to the email address on file from **replynone-otp-imps@auth.seic.com**.

You will then add the phone number you wish to use as your “verification” number. This phone number does NOT need to match the phone number on file. Please note that if you choose a phone number not currently on Pacific Premier Trust’s file, that number will not be used to verify your identity when contacting Pacific Premier Trust. When calling Pacific Premier Trust, you will need to use the phone number on file to verify your identity.

Next, select whether you would rather receive a phone call or a text message to the verified phone number containing a six-digit PIN that you will need to enter to log in.



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Please verify your phone number

Country

Phone Number

US

Enter the one-time PIN that was sent to you.

4

0

9

3

9

7


Resend One-Time PIN.

Continue

Cancel

Subsequent Login Process

For any subsequent logins, you will enter your User ID and Password to reach a page to select your authentication method.



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Select your authentication method.

☒ Authenticator App

☐ Text me at *****24

☐ Call me at *****24

Continue

Cancel

Depending on the selected option, you will either receive the six-digit PIN via phone call, text message, or third-party Authenticator Application.

Editing the Security Profile

If you would like to edit your security profile, click on “Edit Security Profile” after entering your User ID and password. Once clicked, you will follow the same login procedures as stated before.



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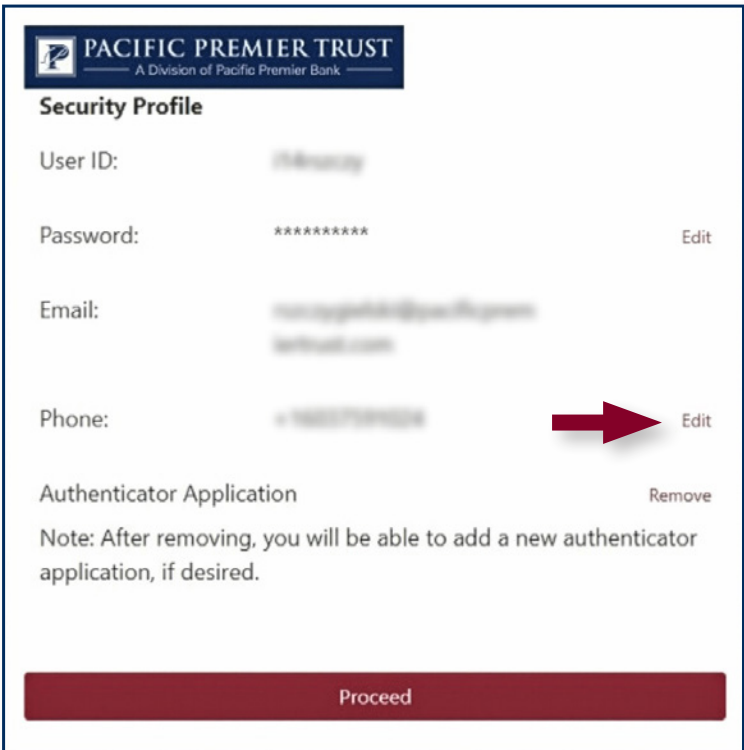
User ID [Forgot User ID](#)

Password [Forgot Password](#)

[Log In](#) [Edit Security Profile](#)

[Register for Online Access](#)

On the Security Profile screen (below), you will have the option to change your phone number and/or add/remove an Authenticator Application.



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Security Profile

User ID: [Edit](#)

Password: ***** [Edit](#)

Email: [Edit](#)

Phone: +1 800 777 7777 [Edit](#)

Authenticator Application [Remove](#)

Note: After removing, you will be able to add a new authenticator application, if desired.

[Proceed](#)

Change Phone Number

To update your phone number from the Edit Security Profile screen, select “Edit” under the phone number section.

Editing the Security Profile (cont.)



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Security Profile

User ID:

Password:

Edit

Email:

Phone:


Edit

Set Up an Authenticator Application

Proceed

Add or Remove an Authenticator App

To add a new Authenticator Application, select “Set Up Authenticator App” and follow the QR code. You will then follow the same steps used when first enrolling with the Authenticator Application.



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Security Profile

User ID:

Password:

Edit

Email:

Phone:

Edit

Authenticator Application

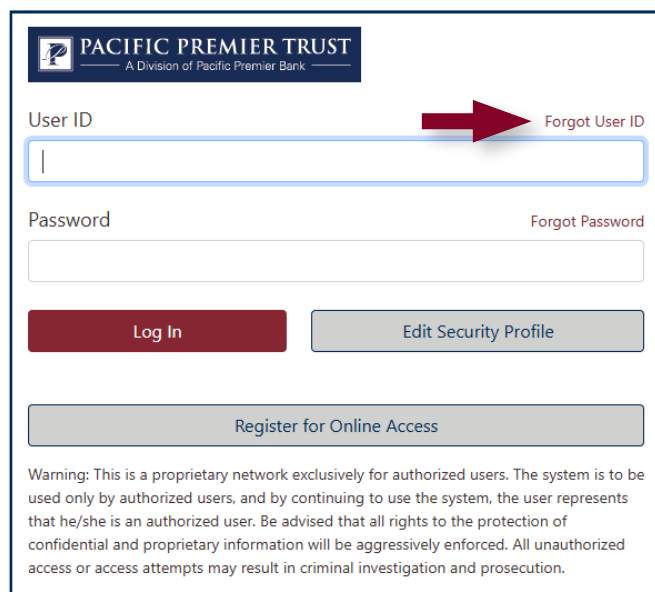
Remove

Note: After removing, you will be able to add a new authenticator application, if desired.

Proceed

To remove an Authenticator Application from the Edit Security Profile screen, select “Remove” next to “Authenticator Application.”

Troubleshooting



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User ID [Forgot User ID](#)

Password [Forgot Password](#)

[Log In](#) [Edit Security Profile](#)

[Register for Online Access](#)

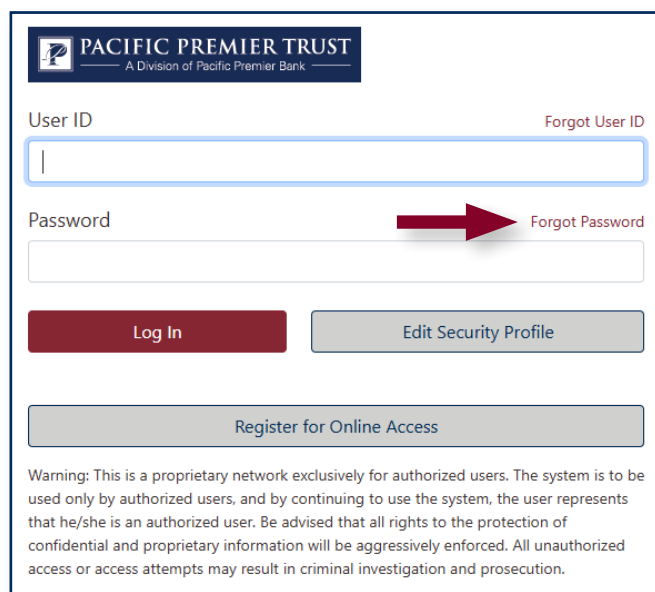
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Incorrect User ID or Password

If you do not know either your User ID or password, you can select “Forgot User ID” or “Forgot Password,” respectively. Once selected, enter your email address on file to receive a link to reset your login information.

Similar to the “Register for Online Access” process, you can select your method of authentication via phone call, text message, or third-party Authenticator Application.

NOTE: If you incorrectly enter your User ID or Password three consecutive times, you will be forced to reset your password. Should this happen, you will receive a message to contact Pacific Premier Trust.



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User ID [Forgot User ID](#)

Password [Forgot Password](#)

[Log In](#) [Edit Security Profile](#)

[Register for Online Access](#)

Warning: This is a proprietary network exclusively for authorized users. The system is to be used only by authorized users, and by continuing to use the system, the user represents that he/she is an authorized user. Be advised that all rights to the protection of confidential and proprietary information will be aggressively enforced. All unauthorized access or access attempts may result in criminal investigation and prosecution.

Expired Password

Users must update their passwords every 365 days. Five days before your password expires, a message will prompt you to update your password.

To update your password, select “Forgot Password” and enter your current password. Once entered, select your authentication method and verify with the PIN provided. Once verified, be able to enter your updated password.

Inactivity

If you have not logged in to your online account in 365 days, you will be locked out due to

inactivity. If this happens when you attempt to log in, you will receive a notification and an email telling you to contact Pacific Premier Trust.

Additional Questions? Contact Us:

Client Services

800.962.4238

Monday - Friday, 7:00 a.m. - 5:00 p.m. MT

clients@pacificpremiertrust.com

