LORING, WOLCOTT & COOLIDGE TRUST, LLC

FIDUCIARY SERVICES

Fidelity Account Information via Account View
USER GUIDE

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Fidelity Account Information via Account View

Welcome to Account View

Loring, Wolcott & Coolidge Trust, LLC welcomes you to Account View.

The Account View product provides you with access to your Fidelity account 24 hours a day. You need to have Microsoft's Internet Explorer Browser or Netscape's Navigator (Version 4.0 or higher) running on your personal computer and an Internet service provider. Optimal viewing will be at a resolution of 1024x768 pixels.

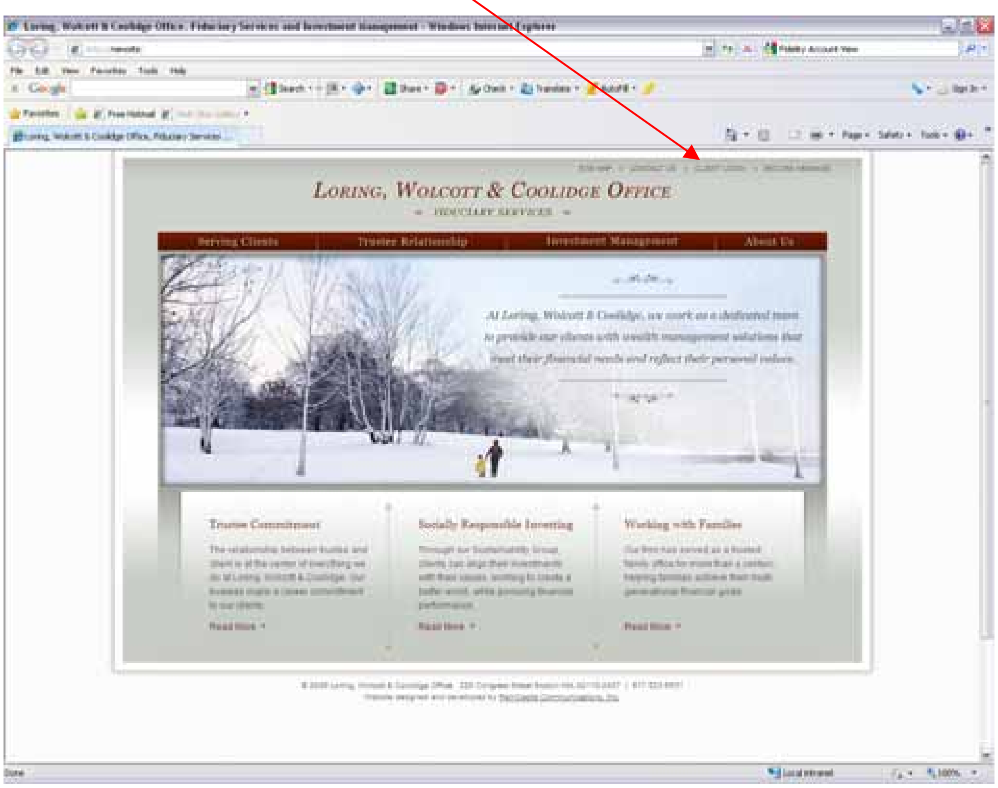
90 days worth of account information may be viewed and printed. Two years of account statements are also available.

Accessing Account Via Loring, Wolcott & Coolidge's Web Site

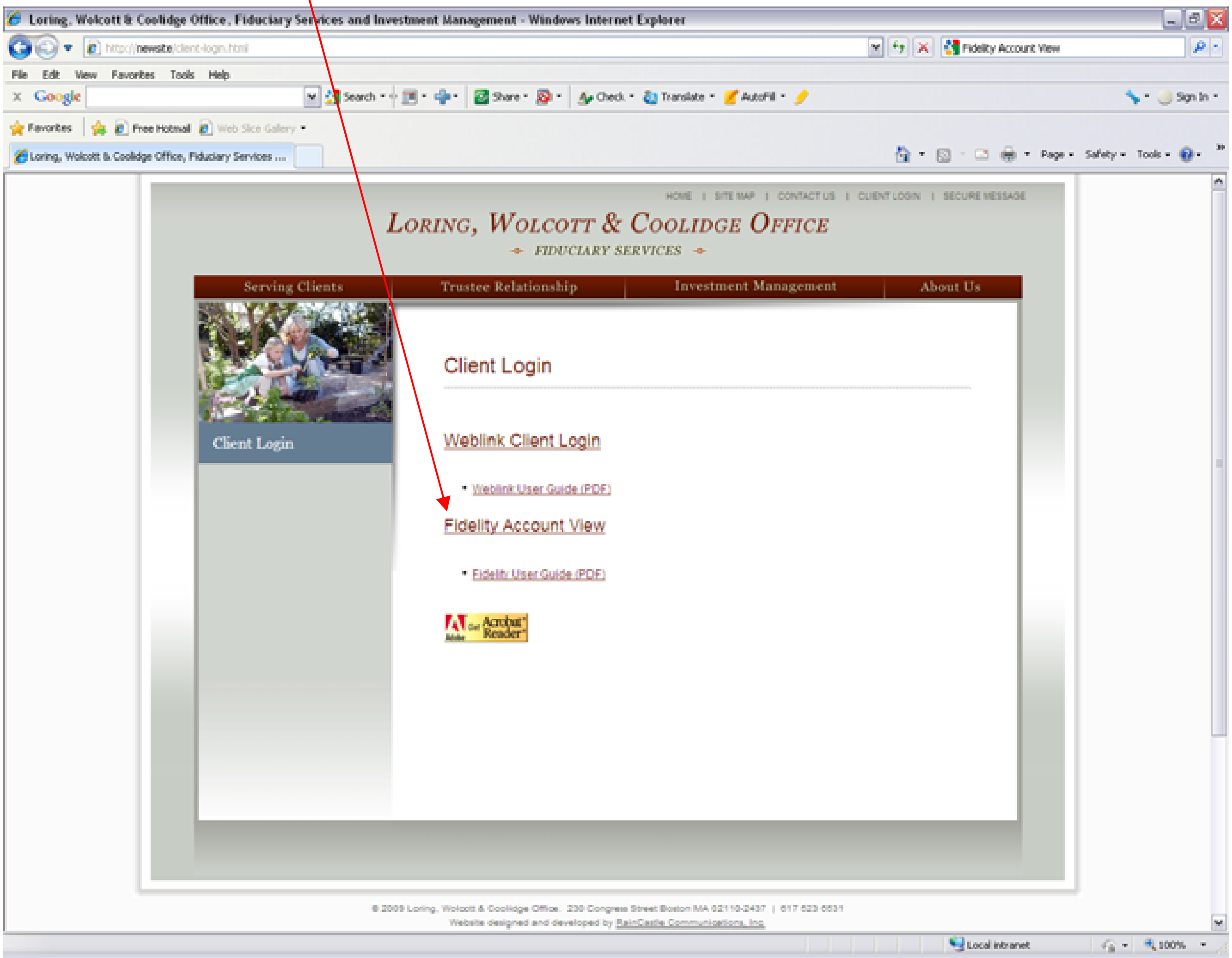
The following steps should be taken to access your account.

1. Logon to the Loring, Wolcott & Coolidge Office Web Site - www.lwcotrust.com (displayed below)

2. Click on the Client Login link



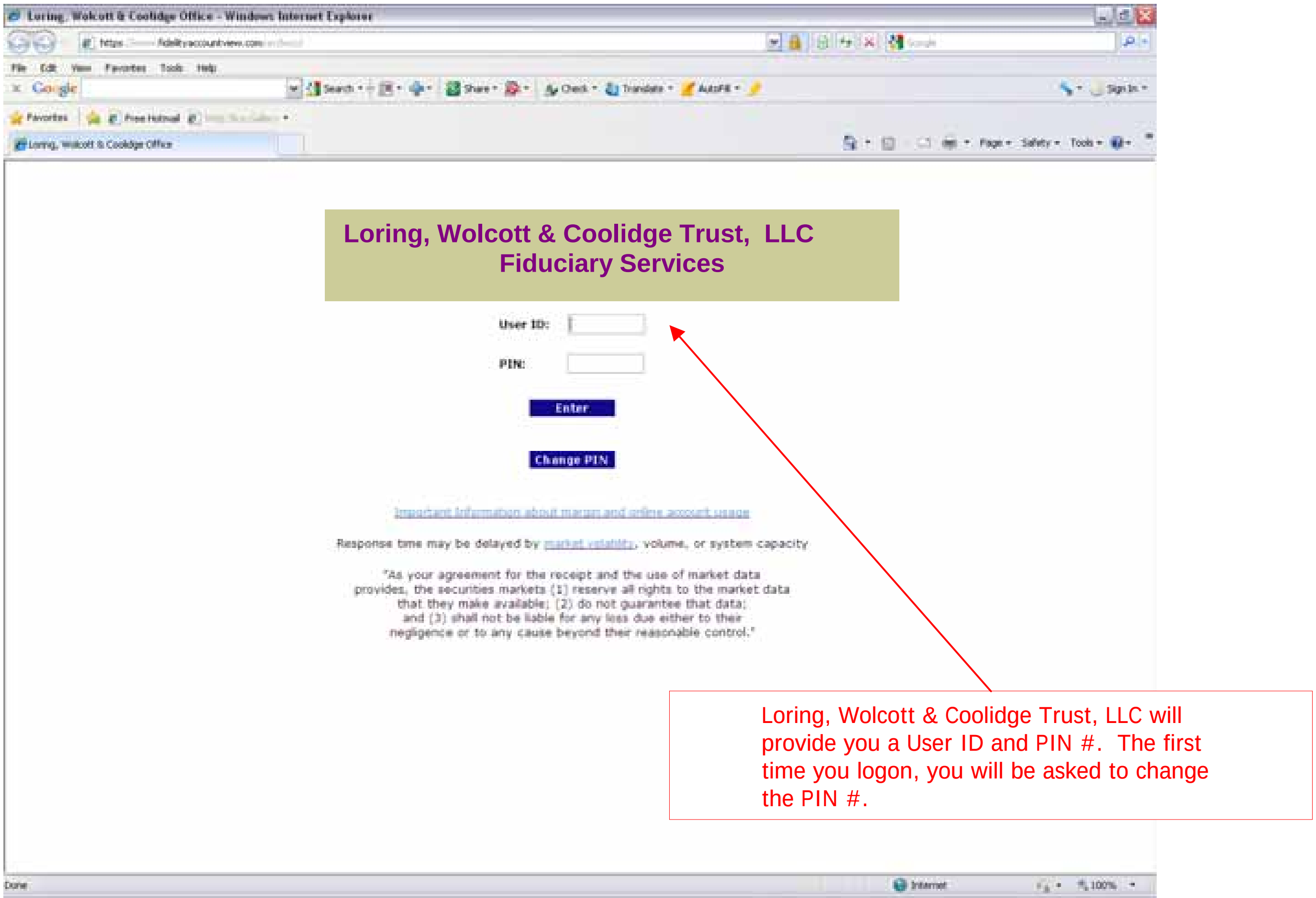
3. Click on the “Fidelity Account View” link



Logon Instructions

Loring, Wolcott & Coolidge Trust, LLC will provide you with a User ID and PIN #. This information is required for you to have access to your account.

All account information is encrypted so complete confidentiality can be achieved.



You will be prompted for your User ID and PIN #. You will only be allowed 3 unsuccessful login attempts for security purposes. The first time you login, you will be forced to change your PIN # **(PIN #s must be at least 8 numbers long, with no sequential numbers).**

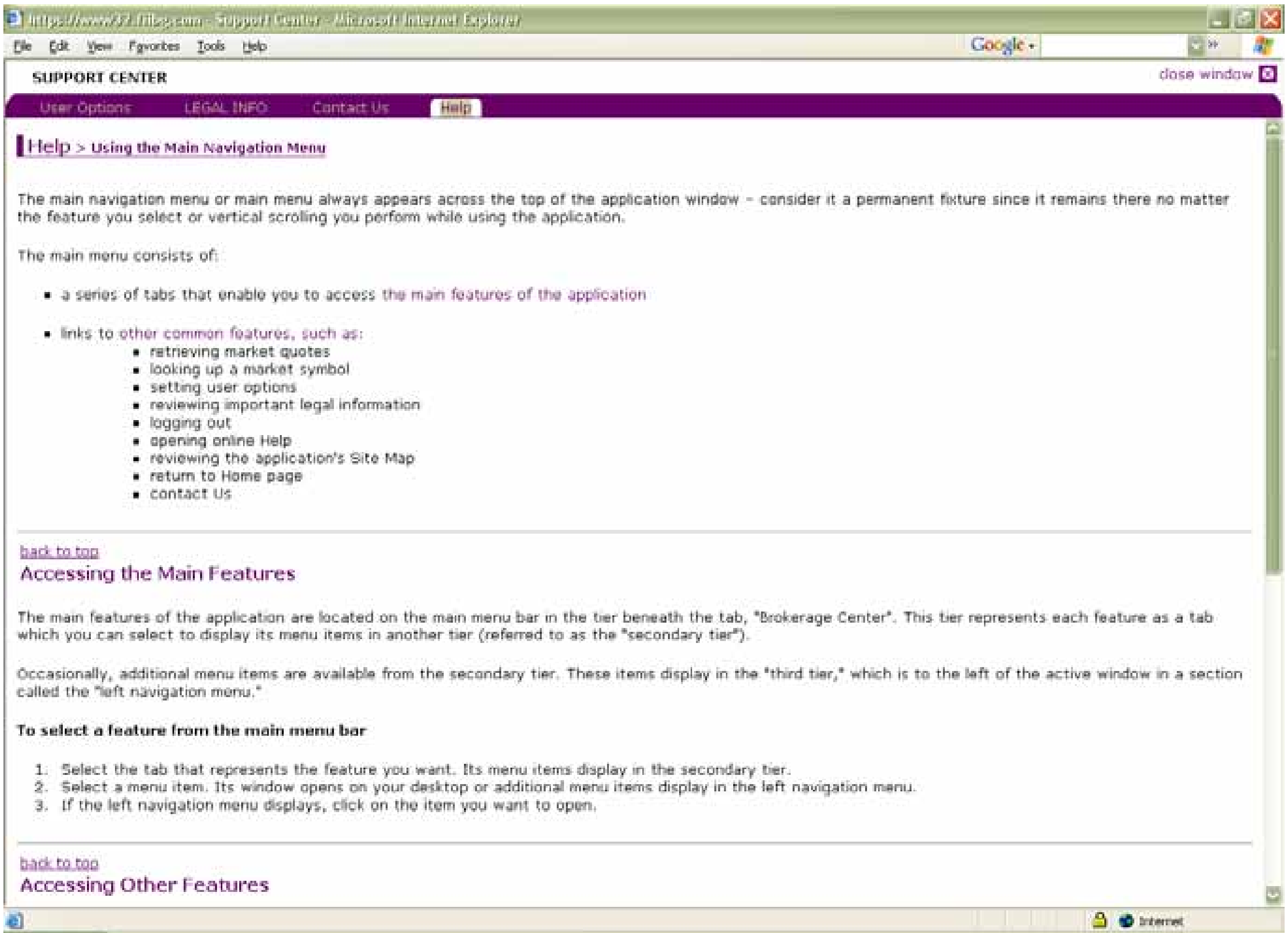
Your PIN # will never expire. Should you forget your PIN # and are prohibited from logging onto the system, please send an email to clientaccountaccess@lwcotrust.com for assistance.

Please note- there is a 24 hour turn around time for new PIN #s.

On-line Help

When the “Help” area is accessed, the following view will be presented. You may click on any of the highlighted topics for more information. For example clicking on “other common features” will display information regarding other features within the program.

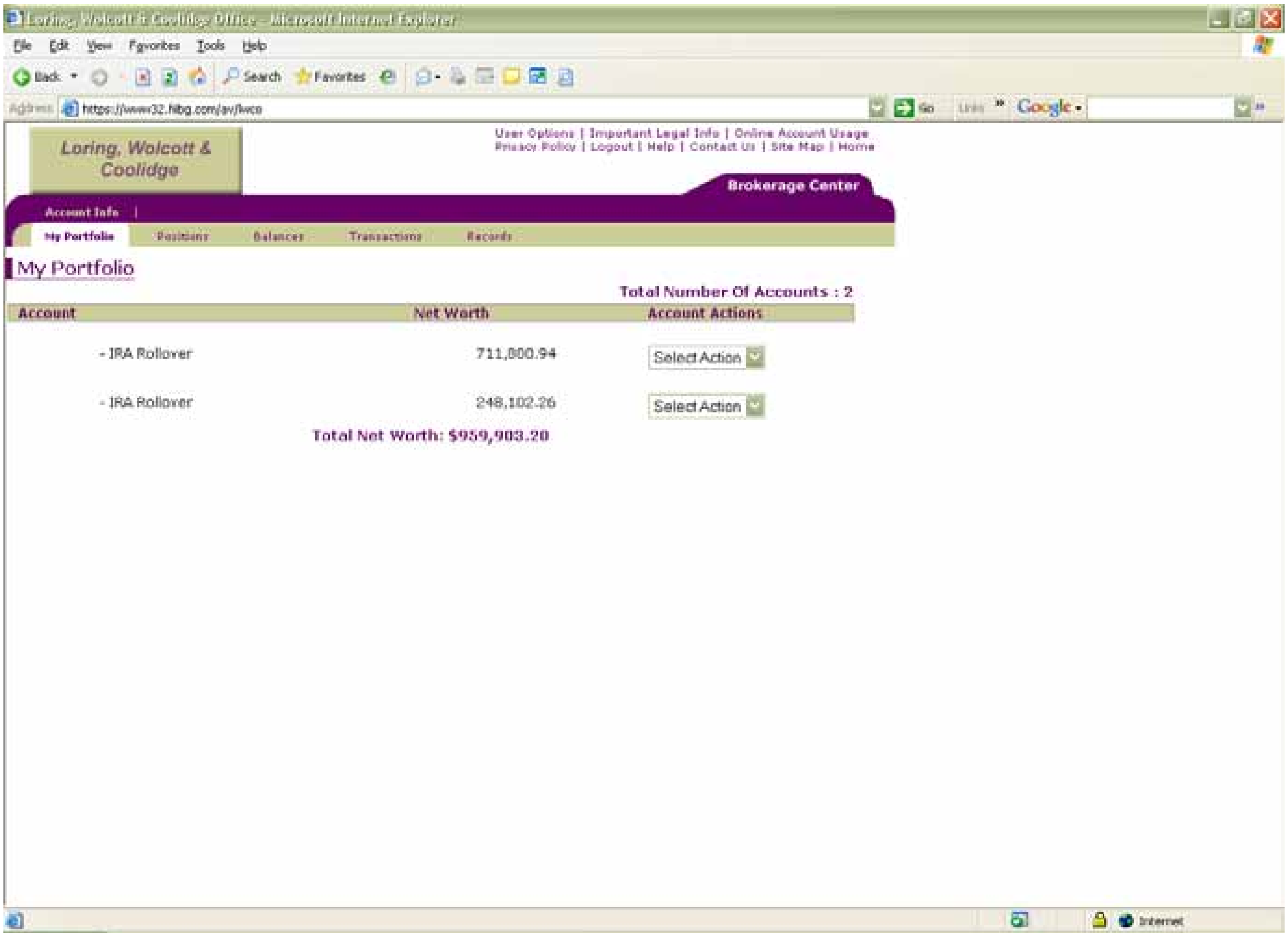
To exit the “Help” area, please click on the “Close Window” button in the upper right hand corner of the screen. Please take advantage of this user-friendly instruction format.



Please review this documentation thoroughly prior to using Account View so you may take full advantage of all the features offered.

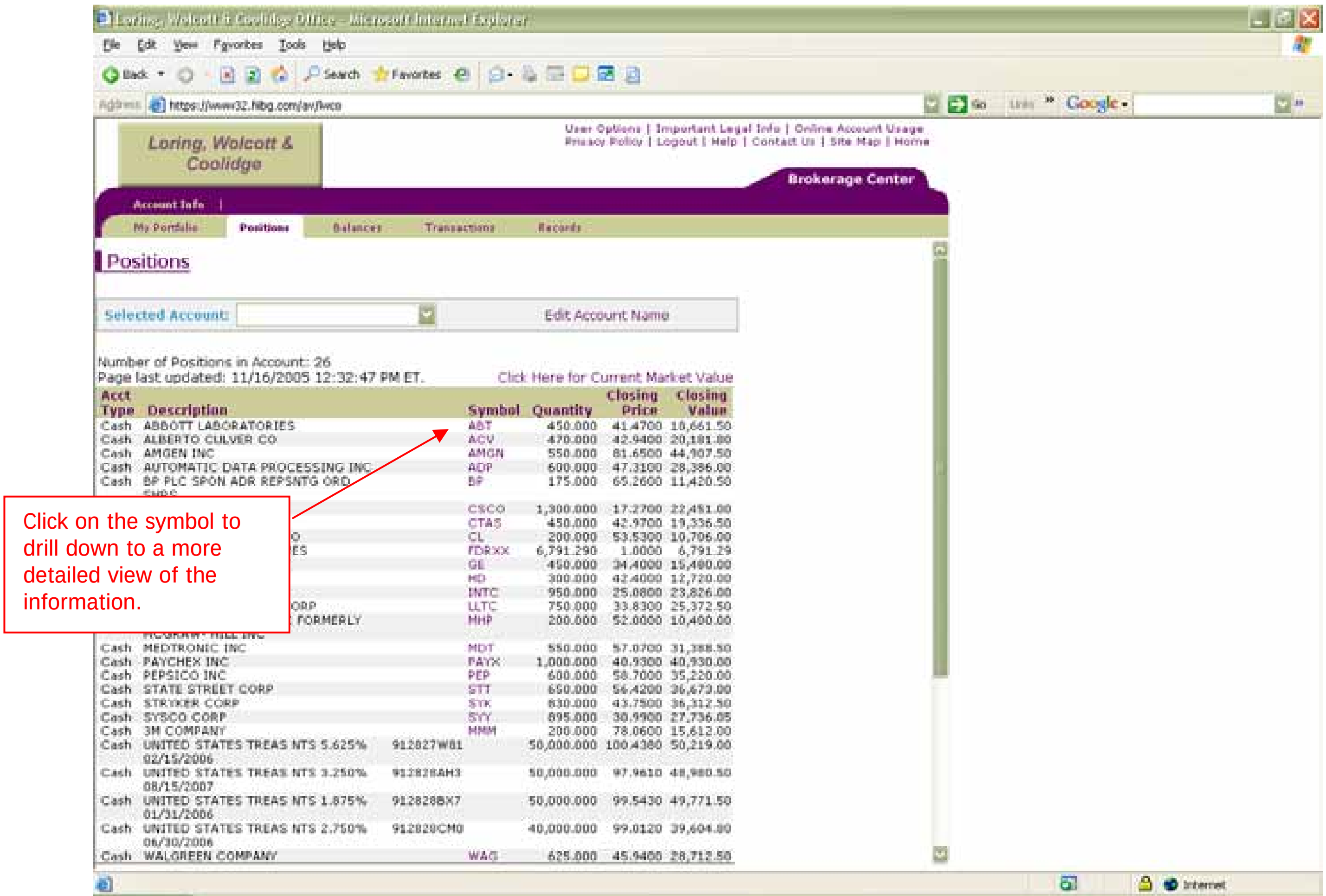
System Navigation

There are 5 tabs that you can choose from to view specific information on your account. You can also click on the 'Select Action' drop down box to choose what information you would like displayed.



Positions Tab

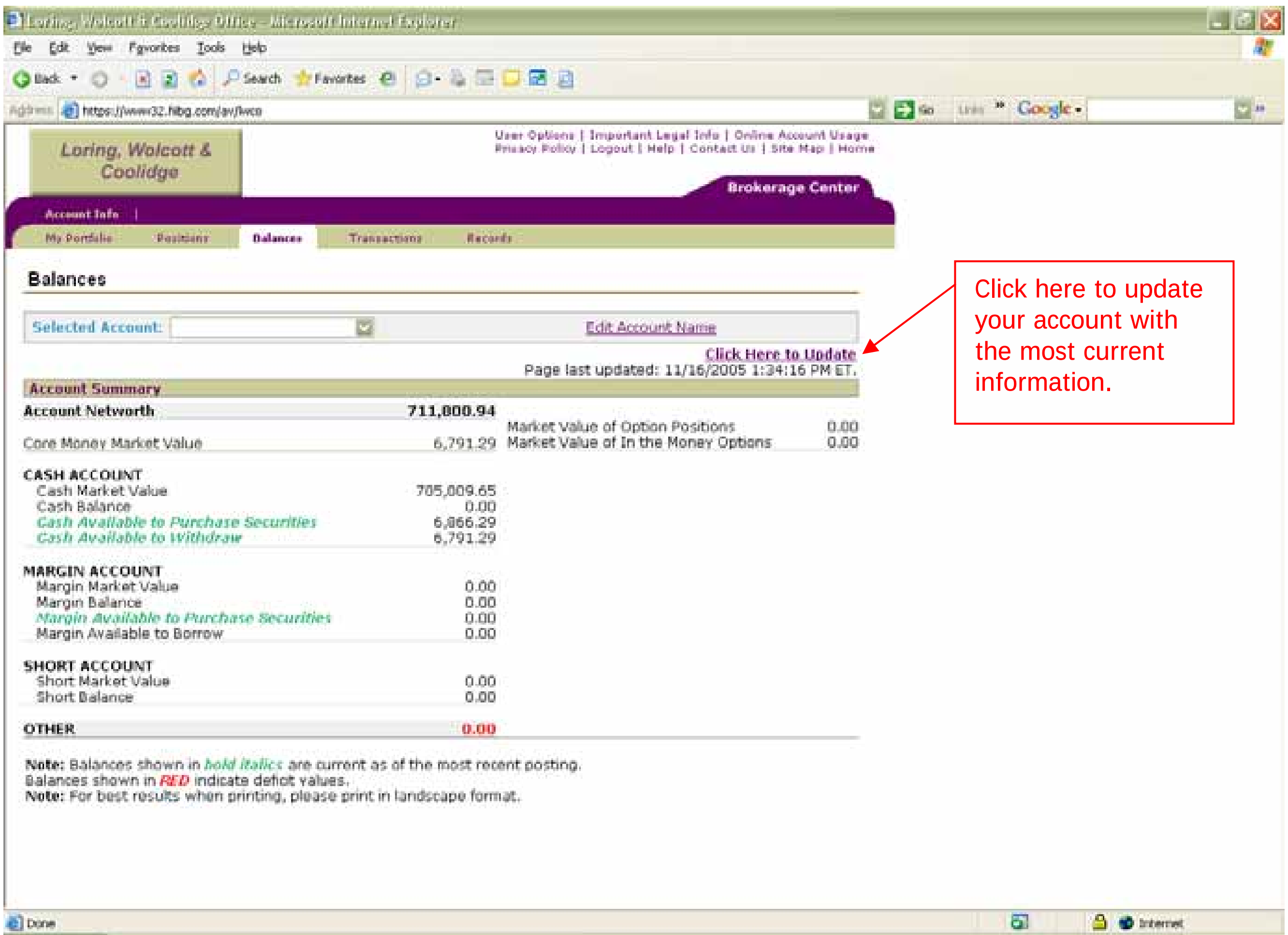
The Positions tab displays asset information. Should you have access to more than one account, a dropdown box will be available with a list of the accounts to which you have access. To access additional accounts, click on the account you wish to view and the account information will be displayed.



Balances Tab

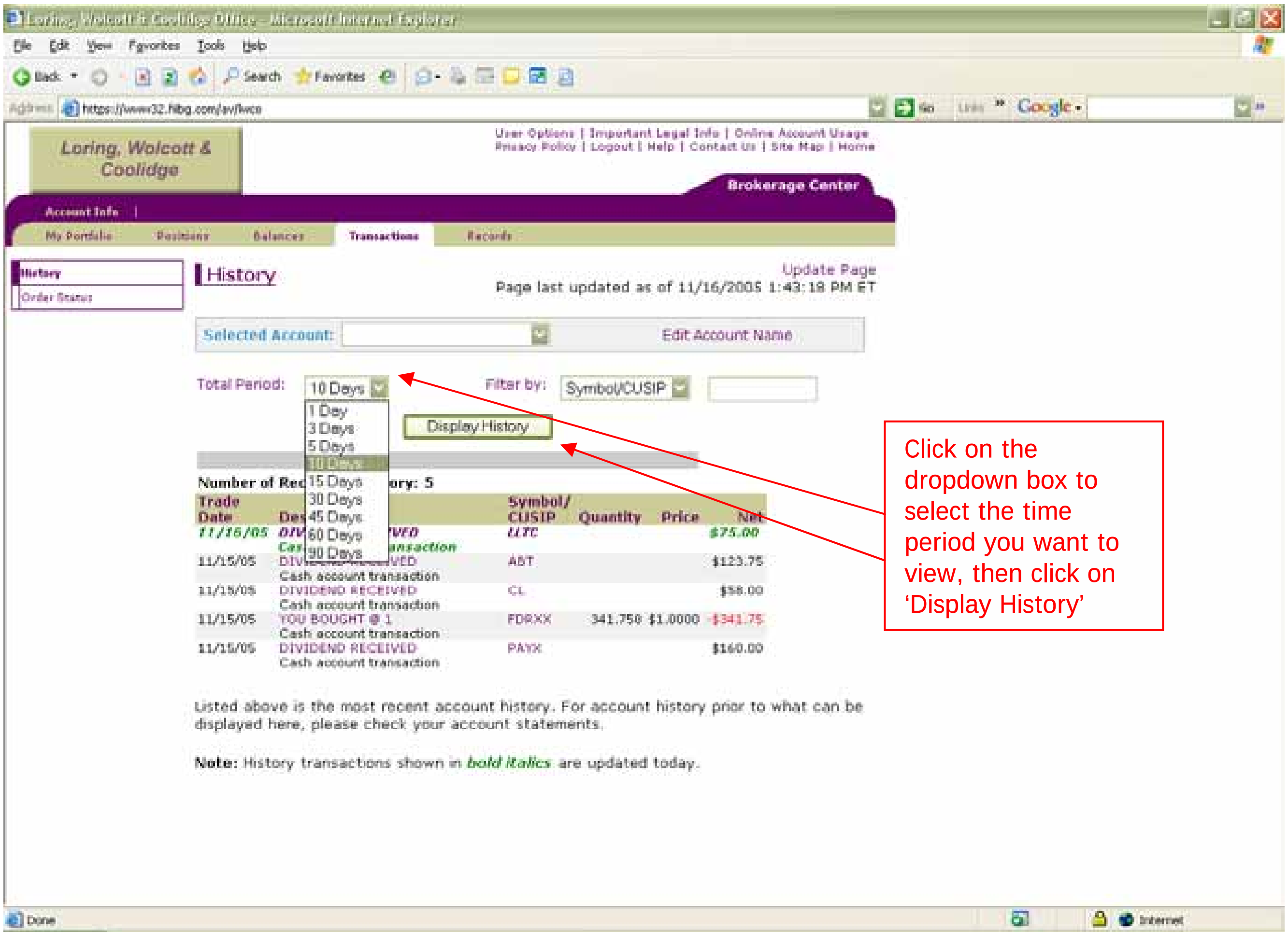
The Balances Tab shows the current cash summary of your account's brokerage balances as of the close of the previous business day. Brokerage balances include the market value of your account's cash, margin, and short account types, if applicable.

An intraday account summary, which enables you to see the impact of intraday activity on some account balances, is also provided. Balances affected by intraday activity display in the window in ***green***. (Note that the transactions that comprise any intraday activity will not be reflected on the History window until the next business day.)



Transactions Tab

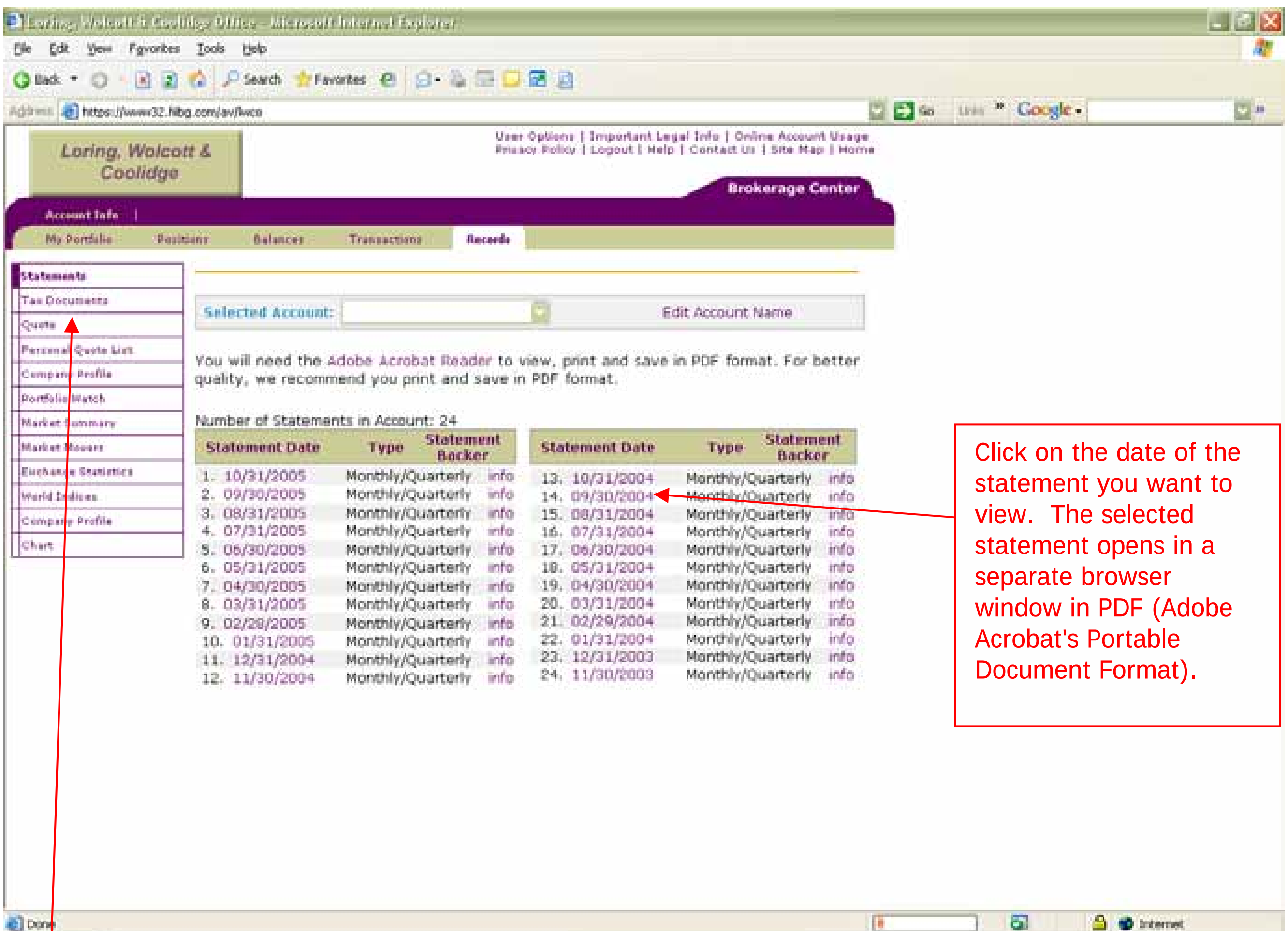
You can view 90 days worth of transactions.



Records Tab

You can retrieve and view copies of your monthly and quarterly account statements in a separate browser window for as far back as 24 months.

Tax forms are also available online for your convenience. You can use these forms to help prepare your tax returns. If, however, you are required to submit a tax form with your return, please use the original tax form mailed to you.



Click on the date of the statement you want to view. The selected statement opens in a separate browser window in PDF (Adobe Acrobat's Portable Document Format).

When there is taxable activity to report for an account, you may select from a list of available tax forms. The selected form opens in a separate browser window in PDF (Adobe Acrobat's Portable Document Format).

Additional Pertinent Information

Should you have any questions regarding your account, please contact your Trustee at (617)523-6531.