Video Transcript: Regions Wealth Program Institutional

Note:
Uplifting music plays.

On screen: Regions Institutional Logo

[Voice-over] As a Regions Institutional Services client,

On screen: Female photo fades in with a green bar at the bottom of screen and text: As a Regions Institutional Services client,

[Voice-over] you'll have access to the Regions Total Wealth Platform,

On screen: Business setting photo fades in with man on phone and new text on green rectangle: you'll have access to the Regions Total Wealth Platform

[Voice-over] a powerful digital solution that provides you with:

On screen: Screen fades to white with text: A powerful digital solution that provides you with:

[Voice-over] (bullet) a user-friendly platform to manage your organization's everyday needs

On screen: Circle graph chart animates with four different colors representing green for equity, blue for fixed income, yellow for cash and equivalents, and orange for other. Text below: A user-friendly platform to manage your organization's everyday needs

[Voice-over] (bullet) the ability to look at portfolio and investment data from different perspectives

On screen: Blue gradient background fades with animated charts and numbers. A solid blue rectangle overlay with text: portfolio and investment data and another blue solid rectangle below with text: from different perspectives

[Voice-over] (bullet) and easy access to reporting and the ability to customize reports

On screen: A green circle fades in with the pdf icon in the center and text below: Easy access to reporting and the ability to customize reports

[Voice-over] You can access Regions Total Wealth by selecting Regions Total Wealth from the Regions.com log in dropdown menu.

On screen: A blurry image with a desk fades in with laptop in the center of screen containing the Regions homepage with Log In drop down menu. Arrow clicks on “Regions Total Wealth” option and a pop up animates over stating You are about to leave Regions Online Banking. Arrow clicks on “Continue” button and fades to the Regions Total Wealth page with user id and password screen. Arrow clicks to type in user ID and password. Arrow clicks on “Log In” button.

[Voice-over] Your Total Wealth home page displays a dashboard with snapshots of key information covering your investment accounts.

On screen: Screen fades to green while the Regions Total Wealth dashboard screen slides in from right with animated charts and account information.

[Voice-over] In the Settings menu, you can customize your view with easy drag-and-drop panels.

On screen: Arrow clicks on Settings with dropdown menu. Arrow clicks on Change panels option. Change Dashboard Panels screen opens and drags panels to the dashboard to change the dashboard preferences. The dashboard now shows more options.

[Voice-over] Use the icons on the left to access more details and views of your portfolio data.

On screen: Zoom into the left-hand side of the dashboard to show icons. Text slides out of the screen: Use the icons on the left to access more details and views of your portfolio data.

[Voice-over] On the **Investments** page, for example, you’ll see the assets for all accounts or, by using the drop-down menu, you can select each individual account.

On screen: Dashboard zooms back out to highlight the Investments icon. Hand icon animates in and clicks on the icon. Investments page fades in. Arrow clicks on the Investments for dropdown menu and displays each individual account.

[Voice-over] You can also view information for specific periods of time and add optional columns to see more detailed information.

On screen: The hand icon clicks on the Period dropdown menu to show options then slides over to the columns icon dropdown menu to show more detailed information. Hand slides down menu and selects Accrued Income from the list and highlights that column after selection.

[Voice-over] The **Realized Gain/Loss** page shows a Summary of realized gain and loss in an easy-to-read table. Choose the Detail view for more information.

On screen: The hand icon clicks on the Realized Gain/Loss icon from left-hand menu and that page fades in. The arrow selects the View dropdown menu with Detail View and Summary View options. Arrow clicks on Detail View option while details of those gain/losses fade on screen.

[Voice-over] And you'll find many statements here in the **Documents** library. Simply choose the account and time period to find what you need.

On screen: The hand icon selects the documents icon from left-hand menu and the documents screen fades in with statements. Arrow selects the Period dropdown menu with various options. Hand clicks on Custom Date Range. The arrow selects the from date and to date and displays those statement options.

[Voice-over] If you have more robust reporting needs, you can create and run reports through the CORE platform.

On screen: Several document icons animate on screen and zoom out as a laptop slides in from the left with a green screen and one arrow pointing right and one pointing left.

[Voice-over] To gain access to CORE, just contact a member of the Institutional Services Team.

On screen: Laptop slides off screen to the right. A circle scales up with Regions building faded in the background and Regions member slides up into the circle. Text below: To gain access to CORE, just contact a member of the Institutional Services Team.

[Voice-over] Once you have received access, just log in to the CORE platform through the OnePass option on Regions.com.

On screen: Laptop slides in with Regions home page. Arrow clicks on the Log In dropdown menu and selects OnePass Login from the menu. OnePass Login screen fades in and login ID and Password are typed in. Arrow clicks on Continue button.

[Voice-over] Once you're logged in, navigate to the Clients and Accounts dropdown menu and select "Clients and Accounts list".

On screen: Wealth screen fades in with Customer name and various menu options. Arrow clicks on the Clients and Accounts dropdown menu and selects Clients and Accounts List. The list fades in.

[Voice-over] Select an account from the 'Account Name' column for the account level details page.

On screen: Arrow slides down and selects an account name from the table and the Account Summary fades in.

[Voice-over] The Search bar is always available to help you quickly find accounts.

On screen: Arrow slides over to the left-hand side of screen and types in ABC Accounts in the search option and selects the Search button. Search results appear below.

[Voice-over] To create and view reports, choose the Reports tab.

On screen: Arrow slides over to the menu bar and selects Reports tab. Reports appear below menu.

[Voice-over] Select the report's general topic in the left, then use the options in the pop-up to customize the report fields and time periods.

On screen: Arrow slides over to the Asset Characteristics list and selects Audit and Compliance option. The Opening Document pop up animates on screen. Arrow selects Asset Subscribed Date From and then OK button.

[Voice-over] You can also:

- Personalize existing reports by dragging additional data in and adding new columns.
- Export reports to an Excel format
- Save reports to the CORE desktop and have them run automatically on a regular basis.

On screen: Laptop scales back to the left of the screen while text animates with the following screens within laptop:

You can also:

Graphics: transaction activity basic screen
Text on right: Personalize existing reports
Graphics: Export screen
Text on right: Export reports to an Excel format
Graphics: Save as screen
Text on right: Save reports to the CORE desktop

[Voice-over] Ready to learn more about Regions Total Wealth account and reporting features?

On screen: Screen fades to white with a large question mark. The circle in the question mark is a pie chart and text in between:

Ready to learn more

[Voice-over] Reach out to your Institutional Services team to learn more.

On screen: Reach out to your Institutional Services team to learn more.

On screen: Regions Institutional Services logo with disclosures.