

## Reviewing Your Investment Account Online

### Client Online Access

City National provides secure access to multiple functions with one user name and password. This guide provides an overview of the initial set-up of your investment account for online viewing.

A guide to our online services may be found in the “*Reviewing Your Investment Account- Statement and Online Information*” brochure available online and from your Relationship Team.

#### Logging On

To begin, you'll need your User Name, Activation Code (sent by e-mail) and Temporary Password (sent by U.S. mail).

Go to <https://www.services.cnb.com>.

Enter your User Name and Temporary Password.

Leave Company ID and Company Password “blank” (unless instructed by your Company Administrator).

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The way up.®

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**Enter your user information**

User Name:

User Password:

[Forgot User Password?](#)

Enter your company information if applicable.

Company ID:

Company Password:

[Forgot Company ID or Password?](#)

Watch this section for the latest update to CNB Services.

**New Enhanced Security - Now Available!**

In an effort to provide you with even greater protection online, we have implemented easy-to-use security features that add an extra level of user authentication. [Click here to learn more about our enhanced security features.](#)

**Client Support Numbers**

	For account and other banking support, call	For web site technical support, call	
Portfolio Review	800-708-8881	877-442-4262	<a href="#">Learn More</a>
Financial Summary	800-708-8881	877-442-4262	<a href="#">Learn More</a>
IDA Sign on	800-660-6282	877-442-4262	<a href="#">Learn More</a>
Investment Account View	800-708-8881	877-442-4262	<a href="#">Learn More</a>
Money Market Transfer	800-280-1464	877-442-4262	<a href="#">Learn More</a>
Brokerage	800-280-1464	877-707-4262	<a href="#">Learn More</a>
eCityRec	(800) 599-0020, Option 2	(800) 599-0020, Option 2	<a href="#">Learn More</a>
Plan Sponsor Data Transfer	800-660-6282	800-660-6282	<a href="#">Learn More</a>

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Activation Code

Enter your activation code from the Welcome Email in the Enhanced Security Activation window and click Continue.



**CITY NATIONAL BANK**  
The way up.™

Log Off Online Services GO

CNBDemo01 - Previous Login Date: 8/19/2009 10:23:05 AM

 **Enhanced Security Activation**

Please enter your security code received by e-mail, by phone or through your Company Administrator.

Enter Activation Code

Continue

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**IMPORTANT:** For protection of your confidential information, the browser's Back button does not function with this online service.

Enhanced Security Features

Step 1: You will be prompted to answer five, of twenty-four possible, unique security questions. Choose five questions and type five unique responses in the answer field.

Step 2: "Is this the computer you will normally use to access this web site?"

Respond **Yes** if this is the workstation you will normally use to access our website.

Respond **No** if this workstation is in a public area or is not the normal workstation you use.

*For security reasons a "No" response (or clearing your computer's cookies) will prompt you to answer two of your five security questions when you next access the site.*

Click to **Continue**. On the "Congratulations!" screen, click **Continue** again.

The screenshot shows the City National Bank website header with the logo and tagline "The way up.™". A navigation bar includes "Online Services" and a "GO" button. The page title is "Enhanced Security Features". Below the title, a box contains instructions: "The Enhanced Security Profile Questions allow you to authenticate access to your account(s) with information only you provide. Please note that the answers you provide should be actual answers to the questions and not hints for your password." The main content area is divided into two steps. Step 1, "Step 1", instructs the user to "Choose one question from each drop-down list below and supply the answer in the field beneath it." and includes a "NOTE: You must select five different questions." It lists five questions with corresponding drop-down menus and text input fields for answers. Step 2, "Step 2", asks "Is this the computer you will normally use to access this web site?" with radio button options for "Yes" and "No". A "Continue" button is located between the two steps. At the bottom left, there is copyright information: "Copyright © 2009 City National Bank | All Rights Reserved. Equal Housing Lender | Member FDIC". At the bottom right, there is an "IMPORTANT" notice: "IMPORTANT: For protection of your confidential information, the browser's Back button does not function with this online service." The page also displays a timestamp: "CNBDemo01 - Previous Login Date: 8/19/2009 10:23:05 AM".

After clicking Continue...

The screenshot shows the "Enhanced Security Enrollment Complete" screen. It features a "Congratulations!" message in a box: "Congratulations! You have completed enrollment into our enhanced security feature. Please click the continue button below to begin using this web site." Below the message is a "Continue" button. The page also displays the timestamp: "CNBDemo01 - Previous Login Date: 8/19/2009 10:23:05 AM".

Change the Temporary Password

The Change Password screen prompts you to change the temporary password. Type a new password in the field indicated, then enter it again to confirm. To continue, click **Change Password**.

After clicking Change Password...

<p>Begin Viewing your Information</p>	<p>When your password is successfully changed, you will see the above message. Choose one of the services tabs to begin viewing your information online. <i>You may see all or some of these tabs, based on the CNB products you use.</i></p> <p>Use the <b>Administration</b> tab to perform the following functions at any time:</p> <ul style="list-style-type: none"> <li>• Change Password</li> <li>• Change E-mail Address</li> <li>• Change Enhanced Security Settings</li> <li>• Set Default Page for future sessions</li> </ul> <p>The <b>Secure Requests</b> tab provides access to your Relationship Team using to our secure email facility.</p>
<p>E-mail from City National Bank</p>	<p>You will receive e-mail communications on the following occasions:</p> <ul style="list-style-type: none"> <li>• Welcome message: when added to the system</li> <li>• Activation Code message</li> <li>• Enrollment confirmation</li> <li>• Password changed</li> <li>• Statements Ready – (as new statements become available)</li> <li>• E-mail address changed</li> <li>• Locked out due to excessive invalid log on attempts</li> <li>• Non-active user warning (180 and 240-days without activity)</li> </ul>