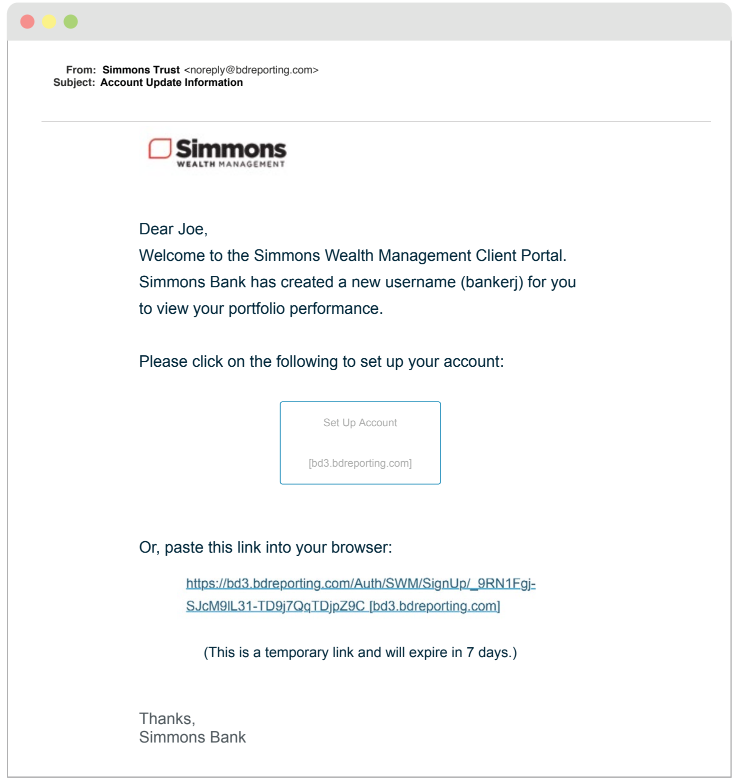
SIMMONS WEALTH MANAGEMENT CLIENT PORTAL
QUICK REFERENCE GUIDE

Simmons WEALTH MANAGEMENT

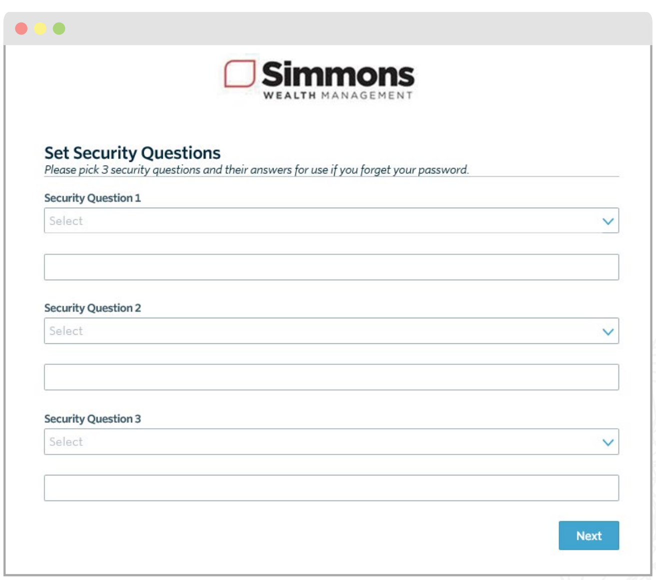
FIRST-TIME USERS:

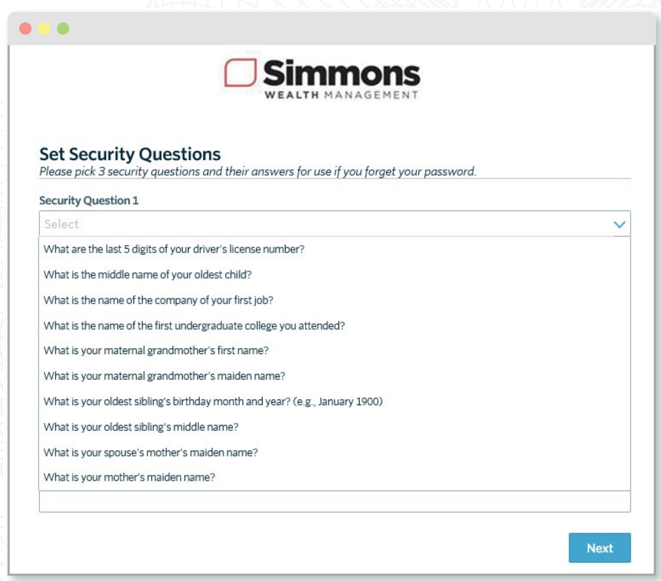
To setup your online account, you'll be receiving an email invitation from noreply@bdreporting.com. During the setup, you will complete your password and challenge questions. Your username will be in the email invitation, as shown on the right.



NOTE: You will need to complete your access setup within seven days of receiving your email invitation.

1. Click on the "Set Up Account" button in the email invitation.
2. Click on each of the "Set Security Questions" and select the questions you wish to use.
3. Enter your response to each of the questions.
4. Click "Next."





After you click the "Next" button, you will be prompted to set up and confirm your password.

1. Enter a new password (minimum eight characters, must be alpha numeric with a combination of upper and lowercase letters).
2. Confirm your password.
3. Click "Next."

You will then be taken to the "Terms and Conditions" page. To agree to the terms and conditions, scroll to the bottom and click "Accept."

Application Terms of Use

Joe, you must agree to these terms and conditions to use the website. Please scroll to the bottom of the terms of use in order to accept or decline.

If you have any questions concerning the Terms of Use or use of this Application, please contact Black Diamond Performance Reporting, LLC at webmaster@blackdiamondreporting.com.

I accept and agree to these Terms and the Data Use Statement

Decline | Accept

After accepting the terms and conditions, you will be logged in to the client portal. You should now receive an email notification indicating your password has been updated.

From: Simmons Trust <noreply@bdreporting.com>
Subject: New User Setup

Simmons WEALTH MANAGEMENT

Dear Joe,

This is a courtesy notification that your Simmons Bank password has been updated for username: bankerj. If you did not make any recent changes to your account, please contact your system administrator.

Thanks,
Simmons Bank

Note: You will find the Client Portal login on simmonsbank.com. Click the login button and select "Trust - Wealth Management" from the drop down menu.

https://bd3.bdreporting.com/Auth/SWM/Signin

Please contact your Trust Administrator if you have any questions.