

## Banner Area

- Text links are replaced with images where possible and the separator line that existed between the items is removed.
- The scrolling ticker feature is retired. Users are encouraged to create Security Watchlists to track their desired securities. To provide quick access to the Security Watchlist, the feature is moved from the Portfolio menu navigation to an image in the Banner area.
- Quick Quote and Security Search are updated for a clean look and easy user experience. The entry field includes instructional text guiding the user to type a ticker symbol to receive a quote. The quote is triggered based on the selection of the Enter key on the keyboard or by tabbing away from the field after an entry has been made; no longer requiring you to click the Quick Quote button.
- Preferences is updated to combine the previous Preferences and Access Management menus.
  - *Manage Access ID and Password.*
  - *Manage Personal Information.*
  - *Manage Preferences.*
  - *Manage Security Watchlist.*
- Logout will be renamed to Sign Out and will remain a text link, as there is no universal image representing this option.
- The Navigation bar retains the same background color, text color, and font of your institution's main menu inactive tab structure. The sub-menu and data view menu items are white with black text; this is not customizable. All other font, font family, link colors, background colors, and text colors remain unchanged.
- A new Home image is added to the Navigation bar. It is listed first before the other navigation options and, when selected, presents the user with their default landing page in Client Point: either Financial Summary, Portfolio Snapshot or the user's preference, if allowed to specify. There is no change to the user experience upon initial sign in to Client Information Portal.

## Page Modifications

- The current Download and Print links are replaced with corresponding images.
- To provide a cleaner presentation, alternate row shading is removed from all pages and replaced with a light gray separator line under each line item and lowest level category description.

## Charts

- All pie charts are replaced with donut graphs. These graphs are interactive, providing the user the ability to select a segment of the graph or legend and be directed to the page or category, where applicable. The color of the graphic remains unchanged; however, the font used in the legend is updated to be more in line with standard fonts on Web pages.
- The Portfolio Snapshot page is enhanced to include a donut graph. The graph includes the list of groups and their corresponding market value. When selected, sections of the graph and legend link directly to the Portfolio Positions Allocation page.

## Navigation

- The current tab navigation structure is replaced with a solid menu bar resulting in increased page space. The Navigation bar stretches across the entire width of the page and incorporates hovering over a menu item to identify sub-menus. If a sub-menu contains a data view menu, it is indicated by an arrow and the data view menu displays to the right of the sub-menu.
- To indicate the user's current location within the product, the menu item in the Navigation bar is underlined. Due to the new navigation style, cookies are no longer saved to remember a user's previous location; however, cookies are still used to remember a user's preferences from the Filter area such as whether the additional filters are expanded or collapsed.

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### Hilliard Lyons Trust Company, LLC

500 West Jefferson Street | Louisville, KY 40202  
300 W. Vine Street | Suite 1100 | Lexington, KY 40507  
312 Walnut Street | Suite 3120 | Cincinnati, OH 45202  
110 Main Street | Evansville, IN 47708

502-588-8400 | 888-878-7845  
859-514-6440 | 800-944-2663  
513-345-5251 | 800-884-1750  
812-428-5147 | 888-426-1481

