



User Guide:

Logging in, Statements, Card Activity, Settings

Get Started in Three Simple Steps:

- 1** Log on by clicking here: <https://member.truelinkfinancial.com/sign-in>

True Link CONTACT SIGN UP LOG IN ACTIVATE

I manage a True Link account
Administer True Link Cards or investment accounts

Email address

Password

Log in

[Forgot your password?](#)

I use a True Link Card
Check your balance and review transactions

Last four digits of your card number
0000 0000 0000

[Continue >](#)

I am a trust beneficiary
See information about your trust investment account

[Go to log in >](#)

- 2** Enter your email address

- 3** Enter password

Online Overview

Once you login, you'll have access to:

- View account balance
- View and download trust statements and True Link Card statements
- View deposits
- View True Link Card balance
- View True Link Card transactions and settings
- View disbursement activity

Statements Tab

Go to the Statements tab:

The screenshot displays the True Link online account interface for 'Guy Champlin with Blue Trust'. The top navigation bar includes 'True Link', 'RESOURCES', 'HELP', 'CONTACT', and a 'LOGOUT' button. The account name 'Guy Champlin with Blue Trust' is prominently displayed. Below this, there are three tabs: 'Statements' (selected), 'True Link Card', and 'Disbursements'. The 'Account Balance' section shows a total of \$8,095.26, with a disclaimer that this balance is for informational purposes only. The 'Download Statement' section allows users to select quarterly statements for the period 2017-12-31 and click 'Open'. The 'Sub-Account Reports' section shows a date range from 2020-01-01 to 2020-01-23 with an 'Open' button. The 'Deposits this quarter' section shows a total of \$300.00, with a table listing one deposit: an annuity of \$300.00 on 01/23/2020. The footer contains links for 'TRUE LINK', 'HELP', 'LEGAL', and 'SUPPORT', along with the True Link logo and social media icons.

True Link RESOURCES HELP CONTACT LOGOUT

Guy Champlin with Blue Trust

Statements True Link Card Disbursements

Account Balance Total: **\$8,095.26**

The balance displayed is for informational purposes only. The balance will not necessarily include recent deposits, market fluctuations, interest earned and dividends earned. For your most accurate balance, please contact your representative at Blue Trust.

Download Statement

Quarterly Statements: 2017-12-31 **Open**

Sub-Account Reports

Date range: 2020-01-01 to 2020-01-23 **Open**

Deposits this quarter Total: **\$300.00**

10 records per page Search:

Process Date	Description	Amount
01/23/2020	Annuity	\$300.00

Showing 1 to 1 of 1 entries **First** **Previous** 1 **Next** **Last**

TRUE LINK **HELP** **LEGAL** **SUPPORT**

Leadership
In the press
Careers

Contact
Your security
FAQs
Pricing

Terms of Service
Privacy Policy
Master Services Agreement

1 (800) 299-7646

True Link

W f t i s

View account balance.

True Link RESOURCES HELP CONTACT LOGOUT

Guy Champlin with Blue Trust

Statements True Link Card Disbursements

Account Balance **Total: \$8,095.26**

The balance displayed is for informational purposes only. The balance will not necessarily include recent deposits, market fluctuations, interest earned and dividends earned. For your most accurate balance, please contact your representative at Blue Trust.

View and download a Quarterly Account Statement. Go to the “Download Statement” section, select the quarterly statement you would like to view, and click “Open”. Statements will download open in a tab, and you can download as a .pdf.

Download Statement

Quarterly Statements: 2019-12-31

View and download a custom time period sub-account report. This report will produce a statement showing all account activity for the specified date range. Go to the “Sub-Account Reports” section, select the date range you would like to generate the report for, and click “Open”. Your sub-account report will download as a .pdf.

Sub-Account Reports

Date range: 2020-01-01 to 2020-01-23

View recent deposits.

Deposits this quarter **Total: \$300.00**

10 records per page Search:

Process Date	Description	Amount
01/23/2020	Annuity	\$300.00

Showing 1 to 1 of 1 entries 1

True Link Card Tab

If you have a True Link Card, you will see the True Link Card tab.

If you have questions about any recent transactions, please contact your Trust Administrator.

Don't have a True Link Card? Ask your Trust Administrator if a True Link Card would be a good fit for you and your trust.

Go to the True Link Card tab:

The screenshot shows the True Link Card tab interface. At the top, there is a navigation bar with the True Link logo, and links for RESOURCES, HELP, CONTACT, and LOGOUT. Below the navigation bar, there are three tabs: Statements, True Link Card (which is selected), and Disbursements. The main content area displays the Current Balance as \$977.87 and the Status as Open. Below this, there are links for This Month's Transactions, Transaction Report, Monthly Statements, and Card Settings. The Transaction Report section shows a date range of 2020-02-06 to 2020-02-06 with an Open button. The Monthly Statements section shows a dropdown menu for January 2020 and buttons for Open, Download as Spreadsheet, and Download as PDF. The Card Settings section has a back to top link and an information icon with text: "These are the settings on your True Link Card. The card only works for purchases set to Allow. To change the settings on your card, talk to your card administrator."

You will see your Current Balance and Recent Transactions.

The screenshot shows the True Link Card tab interface with the Transaction Report section expanded. It displays a table of recent transactions with columns for Status, Date, Merchant, Location, and Amount. The first transaction is dated Apr 15, 2 years ago, from SIMPLISAFE.COM Professional Services in Boston at 5:56 pm, with an amount of 0.00. The second transaction is dated Apr 1, 2 years ago, for a Monthly Fee at 1:00 am, with an amount of -\$9.00. Each transaction has a Review transaction button. Below the table, it says "Showing 1 to 2 of 2 transactions" and there are navigation buttons for First, Previous, 1, Next, and Last.

View and download a custom time-period transaction report which will show all transactions occurring on the card for the specified date range you select. To create the report, select a date range and click "Open". The transaction report will open in a new tab.

Transaction Report

Date range: to

View and download monthly statements by selecting the month of interest and clicking "Open". Statements will download as a .pdf.

Monthly Statements

Monthly Statements:

Click on Card Settings to view your card's Spending Monitor. The Spending Monitor will let you know what types of purchase are allowed on the True Link Card.

Access to Cash

- BLOCKED** Cash withdrawals at ATMs
- BLOCKED** Cash withdrawals inside a bank
- BLOCKED** Cash back at time of purchase
- BLOCKED** Cash withdrawals over \$0.00

Top Line Protections

- BLOCKED** Merchants on True Link's ScamWatch list [detail](#)
- ALLOWED** Online and phone purchases
- BLOCKED** International Transactions
- BLOCKED** PIN purchases [detail](#)

Merchant Settings

MY SETTINGS	MERCHANT	MAXIMUM TRANSACTION SIZE
BLOCK	LIQUOR	

Additional Spending Categories

MY SETTINGS	MERCHANT	MAXIMUM TRANSACTION SIZE
BLOCK	Gas Stations (inside)	
BLOCK	Truck Stops	
BLOCK	Wire Transfers	

Spending Categories

ALLOWED Auto Repair & Dealers detail	BLOCKED Bars & Liquor Stores detail
ALLOWED Beauty detail	BLOCKED Charitable Donations detail
BLOCKED Dating & Escort detail	BLOCKED Direct Sales detail
ALLOWED Discount & Variety Stores detail	ALLOWED Education detail
BLOCKED Financial Transactions detail	ALLOWED Grocery Stores detail
BLOCKED Gambling & Casinos detail	BLOCKED Gas Stations - Inside detail
ALLOWED Gas Stations - At Pump detail	ALLOWED Hearing Aids detail
ALLOWED Home Repair & Maintenance detail	ALLOWED Insurance detail
ALLOWED Jewelry detail	ALLOWED Laundry detail
ALLOWED Local Transit detail	ALLOWED Medical & Care detail
ALLOWED Pawn Shops detail	ALLOWED Pets detail
ALLOWED Pharmacy detail	ALLOWED Phone, TV & Cable detail
ALLOWED Professional Services detail	ALLOWED Recreation & Entertainment detail
BLOCKED Restaurants detail	ALLOWED Shopping detail
ALLOWED Smoke Shops detail	BLOCKED Subscriptions detail
ALLOWED Taxes & Government detail	ALLOWED Travel & Transportation detail
BLOCKED Utilities detail	BLOCKED Money Transfers detail