



FLORIDA FIXED INCOME TRUST

Client Portal User Guide

Florida Fixed Income Trust
5502 N Nebraska Avenue
Tampa, FL 33604
Phone 813.238.4800 • Fax 813.238.4810

Table of Contents

Using FL-FIT's Client Portal	1
How Can I Access the Client Portal?	1
How Do I Create a User Name and Password?	1
How Do I Log Into my Client Portal?.....	2
What if I Have Lost My Username or Password.....	2
How Do I Make a Transaction?	3
Making a Purchase	3
Making a Redemption	5
Making a Transfer Between Pools.....	6
Making a Transfer Between Accounts	7
How Do I View My Statements?	8
How to Open a Document	8
How to Print a Document.....	8
How Do I Send a Message to FL-FIT?	8
How Do I Log Out?.....	9

Using FL-FIT's Client Portal

Here at the FL-FIT, we want your experience to be as seamless as possible. To that end, we have created a secure, online client portal so that you can both initiate transactions and check your statement easily and on your own time. This manual will outline how to use the online portal.

How Can I Access the Client Portal?

You can access the FL-FIT Client Portal in several ways:

- **By email.** As an FL-FIT client, you will receive an email when a new statement or new document becomes available. To access the statement or document, simply click on the link provided in the email to access the client login.
- **Through the FL-FIT website.** There is a link to the client portal through our website at www.fl-fit.com. Choose "Client Portal" from the top menu. Then click "Client Login" to access the login page, as shown below.
- **By creating a bookmark.** You can access the FL-FIT client portal at any time by opening your browser to the FL-FIT client portal address <https://wertzyork.com/portal/login-page/>. You may want to bookmark this page for future use.

How Do I Create a User Name and Password?

At this time, there is no way to independently create a username and password for the FL-FIT Client

Usernames

Each user will have a unique user name provided by FL-FIT staff. Please keep this username secure as it allows access to all functions on the Client Portal.

adding users to your account.


Portal. Instead, usernames are created when the account is created and emailed to all authorized traders. To create a new user, an organization must submit a letter of instruction on company letterhead, signed by an authorized trader, indicating that a new user may be added to the account. At that time, a username and password for the new user will be sent using the name and email provided in the letter. Please contact FL-FIT if you have any questions about

How Do I Log Into my Client Portal?

Using the steps provided above, access the client login page. Using the username and password provided to you by FL-FIT staff, complete the login form. Click “Log In”.

Username:

Password:

I'm not a robot  reCAPTCHA
Privacy - Terms

Remember Me

[Lost your password?](#)

What if I Have Lost My Username or Password

If you have forgotten or lost your username or password, you may click the “Lost your password?” link.

[Lost your password?](#)

If you have lost your username, enter your email. Otherwise, you may enter either your username or the corresponding email to process this request. This link will send you an email that contains a link to reset your password. Your user name will be listed in the email in the salutation. When resetting your password, the password must pass the strength test in order to be accepted. To create a strong password, use letters, numbers and symbols and avoid using recognizable words or dates.

How Do I Make a Transaction?

After logging into the Client Portal, you need to access the Account Transaction page. In order to access the page, click “Account Transaction” under the “Transaction Pages” drop down.

Your Pages

Account Transaction

Choosing that link will bring you to the Account Transaction page from which all transactions, purchases, redemptions and transfers, are recorded.

Making a Purchase

To make a purchase, first complete the appropriate wire transaction to pool the purchase. You can find the wire instructions under the Client Portal link by clicking on “Wire Instructions”.

After processing the wire transaction, follow these steps on the Account Transaction page to record your purchase:

1. Confirm that your name, business name and email are entered correctly.
2. Select the Account Number for which you would like to process the transaction from the drop-down menu.
3. Select “Buy” from the drop-down menu.
4. When you select “Buy,” an additional item will appear requesting the Federal Wire Reference number. Please enter the confirmation number of the wire transaction provided by your bank.
5. Enter the amount of the transaction.
6. Select the pool you would like to purchase. Only one pool can be purchased in a single transaction. For purchases into multiple pools, please process multiple transactions.
7. Type the required Security Code in the box below the code.
8. Click “Submit.”

FL-FIT CLIENT PORTAL USER GUIDE

Name

Example Client 

Business Name

Example Local Government

Email *

example@localgovernment.us

Buy, Sell, or Transfer *

Buy ▼

Account Number: *

11111111111 ▼

Amount (\$) of Transaction: *

\$1,000,000.00

Pool to Purchase or Redeem:

Cash Pool ▼

Fed Wire Reference #:

123456789

*Purchases only

For Security Enter Code Below

S A J P 2

SAJP2

Submit

After you click submit, you will see a confirmation screen. Also, an email will be sent to your account which includes all the details of the completed transaction.

Making a Redemption

To make a redemption, follow these steps on the Account Transaction page to record your redemption:

1. Confirm that your name, business name and email are entered correctly.
2. Select the Account Number for which you would like to process the transaction from the drop-down menu.
3. Select “Sell” from the drop-down menu. To sell all shares, click “Yes” under All Shares.
4. If not selling all, enter the amount of the transaction.
5. Enter the pool to redeem. You may only process a single pool in one transaction. To process multiple pools, you must process multiple transactions.
6. Type the required Security Code into the box below.
7. Click “Submit.”

Name

Business Name

Email *

Buy, Sell, or Transfer *

Account Number: *

Amount (\$) of Transaction: *

Pool to Purchase or Redeem:

Fed Wire Reference #:

*Purchases only

For Security Enter Code Below
S A J P 2

After you click submit, you will see a confirmation screen. Also, an email will be sent to your account which includes all the details of the completed transaction.

Making a Transfer Between Pools

To make a transfer between pools, follow these steps on the Account Transaction page to record your transfer:

1. Confirm that your name, business name and email are entered correctly.
2. Select the Account Number for which you would like to process the transaction from the drop-down menu.
3. Select “Transfer Between Pools” from the drop-down menu. To transfer all shares, click “Yes” under All Shares.
4. If not transferring all, enter the amount of the transaction.
5. Enter the pool to redeem. Enter the pool to purchase. You may only process a transfer from only one pool to only one pool at a time.
6. Type the required Security Code into the box below.
7. Click “Submit.”

Name

Business Name

Email *

Buy, Sell, or Transfer *

Account Number: *

All Shares
 Yes

Amount (\$) of Transaction: *

Pool to Redeem:

Pool to Purchase:

For Security Enter Code Below

S A J P 2

After you click submit, you will see a confirmation screen. Also, an email will be sent to your account which includes all the details of the completed transaction.

Making a Transfer Between Accounts

To make a transfer between accounts, follow these steps on the Account Transaction page to record your transfer:

1. Confirm that your name, business name and email are entered correctly.
2. Select “Transfer Between Accounts” from the drop-down menu. To transfer all shares, click “Yes” under All Shares.
3. If not transferring all, enter the amount of the transaction.
4. Select the account and pool to redeem. Select the account and pool to purchase. You may only process a transfer from only one account and pool to only one account and pool at a time.
5. Type the required Security Code into the box below.
6. Click “Submit.”

Name

Business Name

Email *

Buy, Sell, or Transfer *

All Shares
 Yes

Amount (\$) of Transaction: *

FROM Account Number:

FROM Pool

TO Account Number:

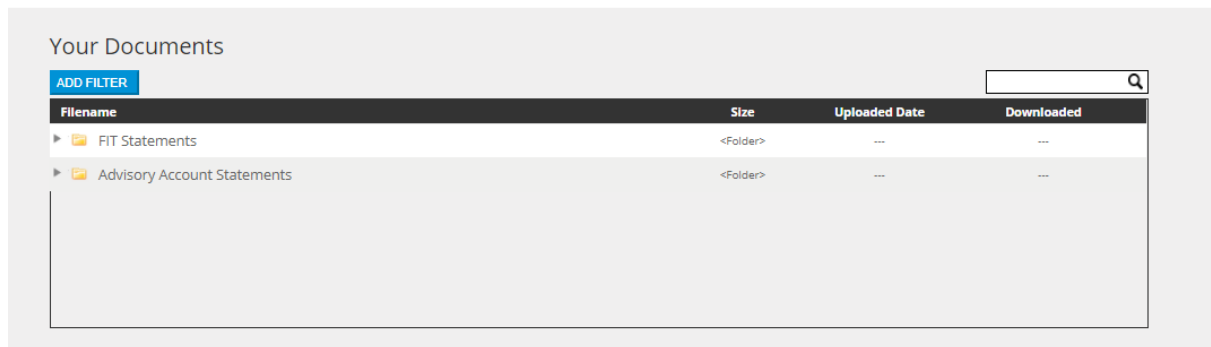
TO Pool

For Security Enter Code Below
SAJ P 2

After you click submit, you will see a confirmation screen. Also, an email will be sent to your account which includes all the details of the completed transaction.

How Do I View My Statements?

Each month, you will receive an email informing you that a new statement has been uploaded to your Client Portal. All statements are loaded in PDF format. To access your statements, log in to the Client Portal. You will find all your statements, and other documents related to your account, in the “Your Documents” header.



How to Open a Document

Click on the appropriate header: General or FIT Statements. Click on the document you would like to open. Your browser should automatically open the document and begin to download. Depending on your browser, you may be asked if you would like to open or save the file. You may do either depending on your intended use.

How to Print a Document

To print a document, download it as described above. From there, click CTRL + P to print from the Adobe Reader.

How Do I Send a Message to FL-FIT?

Communicating with FL-FIT through the web couldn't be easier. First, you can always send a message directly to info@fl-fit.com. Also, you can use the online contact sheet to contact FL-FIT staff. It can be found on the menu on the top of each of the web pages.

From your Client Portal, you can also send a private message. Simply add your message below the “Private Messages” header. Select any member to send your message. A history of your private messages will be kept in your portal for easy review.

Private Messages

	NEW	Inbox	Sent	Archive	Trash
To *	<input type="text" value="Select Members"/>				
	<small>Select one member will create a Dialogue, selecting multiple members will create separate message threads</small>				
Subject *	<input type="text" value="Message Subject"/>				
Message *	<input type="text" value="Type your private message here"/>				
	SEND MESSAGE	CANCEL			

How Do I Log Out?

You will find the option to log out at the top of your HUB page.

Example Client, welcome to your Private and Secure Client Portal

From this page, you can access many tools needed for account management.

In "Your Pages," you will find the link to process an account transaction. In "Your Documents," you will find all relevant account information, including account statements. You can also send private messages to the advisor using the "Private Message" function. **LOGOUT**