



Client Information Portal

New User

Security & Sign-On Guide

500 West Jefferson Street
Suite 700
Louisville, KY 40202
(888) 878-7845



Getting Started

1. Obtain the Access ID and initial Password from your Administrative Officer
2. Visit trust.hilliard.com, click on the **Account** button, scroll down and choose **Log In To View Your Trust Company Accounts**



It may be helpful to save the Client Information Portal site to your Favorites folder for future use.



Secure Sign-On Enrollment

Account Access

1. Accessing the HLTC Client Information Portal requires a "Secure Sign-On" enrollment process. You will be asked to provide personal information and create a new password. This information is stored in an encrypted file, secure from outside sources. Secure Sign-On is used to ensure that only authorized individuals can access financial information online, meeting Federal guidelines set forth by the FFIEC (Federal Financial Institutions Examination Council).

HILLIARD LYONSSM Trust Company

Client Information Portal

You have been successfully signed out.

Please enter your Access ID and Password and click "Sign In."

Access ID:

Password:

[Forgot your password?](#)
If you do not remember your password, enter your Access ID above and select the "Forgot your password?" Link.

Sign In

Your Access ID will be locked after 3 invalid sign in attempts.

Welcome to the Hilliard Lyons Trust Company, LLC Client Information Portal, an internet based tool providing secure access to your portfolio. Should you have questions specific to your account, please contact your Trust Administrator or Portfolio Manager. Should you have questions specific to account or technology support group at 877-226-1234 or by email at:

Records are updated each business day to reflect balances. Mutual funds are re-priced daily. Other assets are re-priced.

Your privacy is our responsibility.
We promise to keep your personal information private and secure. To learn more, please read our [privacy policy](#).

This site uses advanced security features during the sign in process. To learn more, please read our [FAQ](#).

Norton SECURED
powered by Symantec
SAFER. SO. SECURE.

Enter your Access ID and Password, and click [Sign In](#) to begin the secure sign-on enrollment process.

Security Enrollment [FAQ](#)

Security measures exist to protect your identity. Please enter your legal name and home address as they appear on your government-issued ID which is used to establish additional security to protect your financial data. This information is encrypted, securely stored and is not shared with third parties or used for marketing purposes. Select the FAQ link for more information.

Please provide the following information (* = required field).

*First Name (Legal):
Middle Initial (Legal):
*Last Name (Legal):
*Home Address (Legal):
Suite/Apt:
*City:
State:
Province/Region:
*ZIP/Postal Code:
*Country:
*DOB (MM/DD/YYYY): / /
*Primary Phone: U.S. () - ext Text-Enabled
Secondary Phone: U.S. () - ext Text-Enabled
Work Phone: U.S. () - ext Text-Enabled
Other Phone: U.S. () - ext Text-Enabled

Fields with an asterisk (*) are required. Select the box where indicated if the phone entered is enabled for text messaging.

- 2. Next, you will be prompted to create a new, complex password based upon the criteria provided. This reduces the risk of others accessing your account information.**

You must create a new password before you can access your financial information. Please provide the information below and click "Submit." If you are unable to complete the creation of a new password successfully, please contact customer support.

New Password:

Having a strong password helps to protect your information from unauthorized access. Your password must be 8 to 24 characters long. It must contain a mix of at least 3 of the 4 types below:

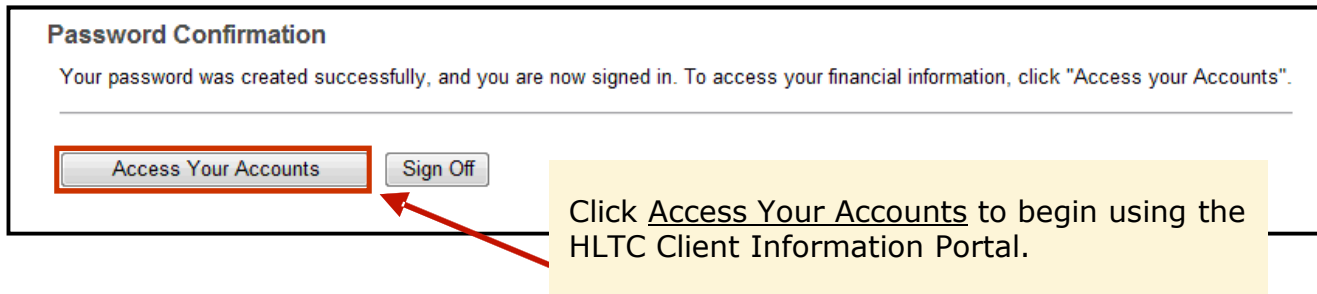
- 1) Numbers
- 2) Uppercase letters
- 3) Lowercase letters
- 4) Special characters from the following: ! @ # & * - _ { } : ' , .

Your password is case sensitive.

Confirm Password

Account Access

3. Once your password is confirmed, you can begin accessing information within the website.



Password Confirmation

Your password was created successfully, and you are now signed in. To access your financial information, click "Access your Accounts".

[Access Your Accounts](#) [Sign Off](#)

Click Access Your Accounts to begin using the HLTC Client Information Portal.

The screenshot shows a web interface for password confirmation. The text indicates that the password was created successfully and the user is signed in. Two buttons are visible: "Access Your Accounts" and "Sign Off". A red box highlights the "Access Your Accounts" button, and a red arrow points from a yellow callout box to it. The callout box contains the instruction: "Click Access Your Accounts to begin using the HLTC Client Information Portal."




Subsequent Log-On

Subsequent Account Access

Additional Authentication for Subsequent Access

During the Log In process the software provider analyzes numerous elements regarding your device and environment to ensure identity. When something changes, an additional step in the Log In Process may be required.

For example, when accessing the site from a computer that is different from your prior log in, you may be prompted to enter a one-time security code. This code will be provided through the phone number on record, either via a phone call (Option A) or text message (Option B).



One-Time Security Code

An extra layer of security is needed to complete sign on. We'll send you a one-time security code that you will need to enter before you can access your accounts.

Tell us where to reach you.

We need to call or send you a text message to complete this process. Select a delivery method option below, agree to the terms of use if displayed, and click the Place Call/Text button to receive your one-time security code.

Phone Number	Delivery Method
XXX-XX5-4479	<input type="radio"/> Voice
XXX-XX8-3983	<input type="radio"/> Voice <input checked="" type="radio"/> Text <input checked="" type="checkbox"/> I agree to Terms of Use

[My phone is not available or listed above.](#)

Note: Standard text message rates apply. Contact your wireless carrier for details.

Choose your delivery method, agree to the Terms of Use, and click Place Call/Text. If your phone is unavailable or not listed, click on the link My phone is not available or listed above.

Option A – Voice (Phone Call)

One-Time Security Code Entry

Enter the security code.

Please wait for your phone call. We are now calling XXX-XX5-4479.
During the call, you will be asked to enter the one-time security code displayed below.
Please say or enter each number individually.

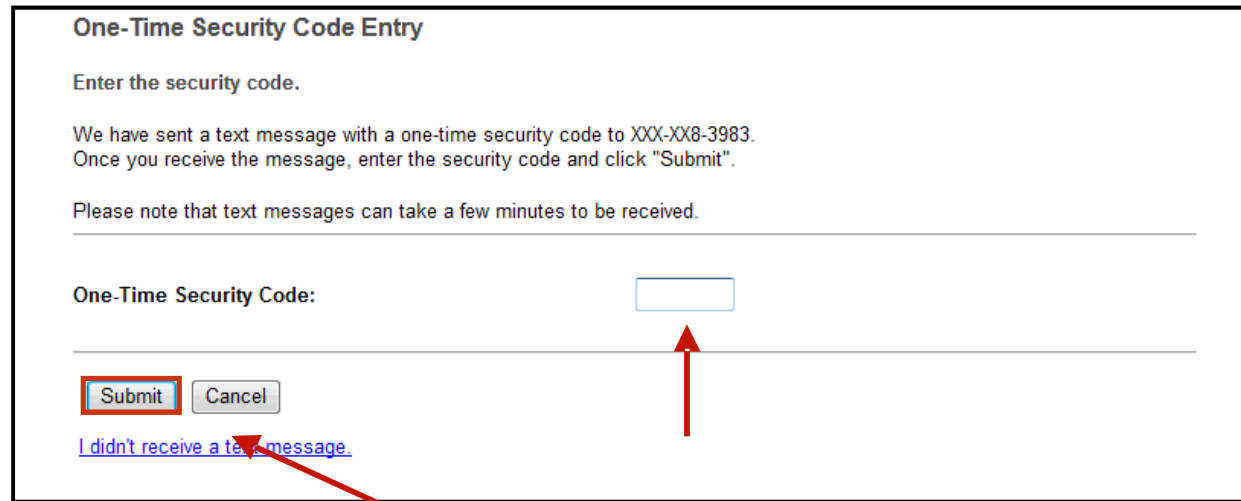
Once your security code has been confirmed over the phone, click "Phone Call Complete."

Security Code: 21470

[I didn't receive a phone call.](#)

When you receive the phone call, be prepared to enter this five-digit code using the telephone keypad. Next, click Phone Call Complete.

Option B – Text Message



One-Time Security Code Entry

Enter the security code.

We have sent a text message with a one-time security code to XXX-XX8-3983. Once you receive the message, enter the security code and click "Submit".

Please note that text messages can take a few minutes to be received.

One-Time Security Code:

[I didn't receive a text message.](#)

Annotations: A large yellow arrow points from the left towards the form. A red arrow points from the 'Submit' button to the text message link. Another red arrow points from the text message link to the security code input field.

Enter the five-digit security code sent via text message here. Next, click Submit.

Forgotten Passwords

If you've forgotten your password, you must create a new password before you can access your financial information. Please provide the information below and click "Submit". If you are unable to complete the creation of a new password successfully, please contact customer support.

New Password

Having a strong password helps to protect your information from unauthorized access. Your password must be 8 to 24 characters long. It must contain a mix of at least 3 of the 4 types below:


- 1) Numbers
- 2) Uppercase letters
- 3) Lowercase letters
- 4) Special characters from the following: ! @ # & * - _ { } : ' , .

Your password is case sensitive.

Your password must be different than your previous 8 passwords used on this site.

Confirm Password

Account Specific

Please contact your Administrative Officer or Portfolio Manager. Click on the **Contact Us** link  located in the Banner area of Client Information Portal to access individual contact information.

Account Access, Passwords or Computer Technology

Should you need any further guidance, our technology support team is available weekdays from 7:30 a.m. to 5:00 p.m. EST. Contact them at 877-226-1244.

Please be sure to mention that you are trying to access the "**HLTC Client Information Portal**". For verification purposes, the technology support team will need the **User ID and Account Number**. It is also important to note that the person to whom the User ID was issued is the individual who must make the phone call.

System Recommendations

1. Pentium Dual-Core/Athlon X2 minimum, Core 2 Duo/Athlon II X2 or higher recommended
2. 1024 x 768 or greater resolution
3. RAM 1G required minimum, 2G recommended
4. Additional software Microsoft® Excel® 2003, 2007 or 2010 Adobe® Acrobat® Reader 11.0 or newer

Supported Browsers & Supported Operating Systems

Edge - Windows 10

Internet Explorer*- Windows 7, Windows 8, Windows 8.1, Windows 10

Firefox - Windows 7, Windows 8, Windows 8.1, Windows 10

Chrome - Windows 7, Windows 8, Windows 8.1, Windows 10

Safari - Mac OS X 10.11 "El Capitan"

iOS iPad 2, 3 and 4

** Client Information Portal may not be compatible using Internet Explorer on tablets or other mobile devices.*