



SEI Trust Company CIT Dashboard

New User Setup





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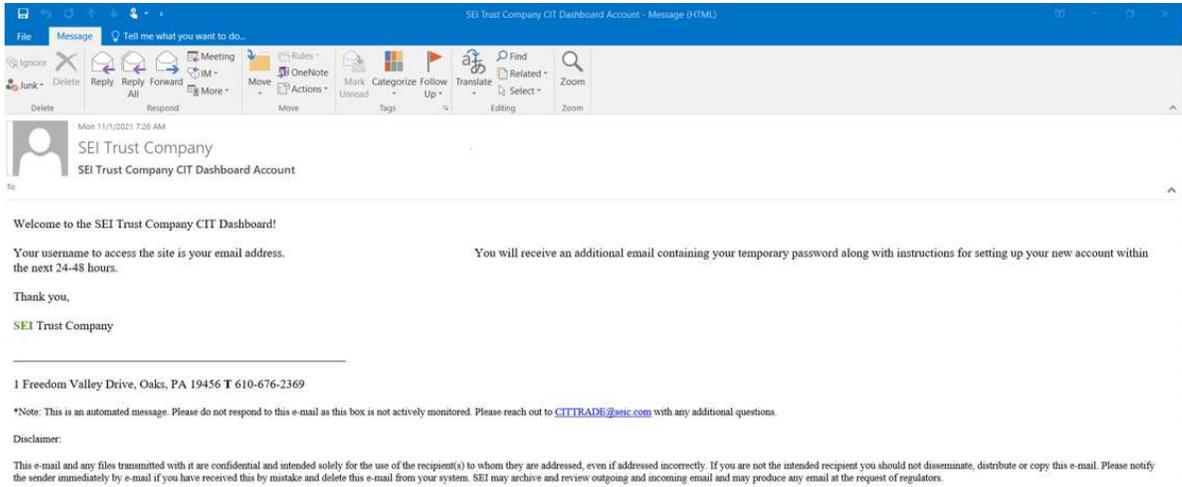
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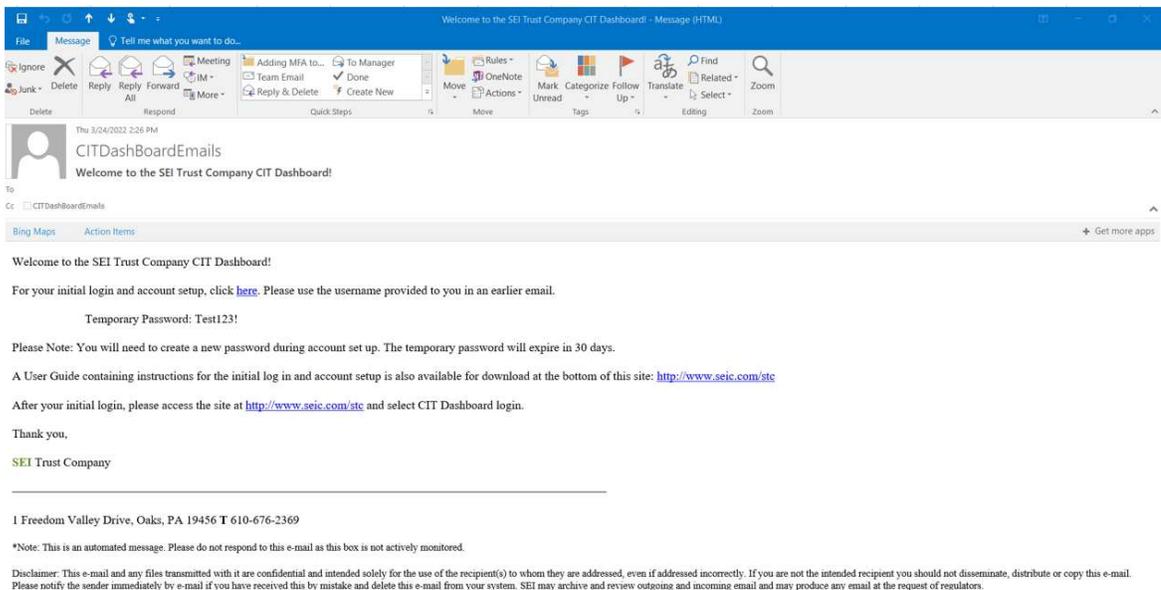
I. New User Initial Setup

New users to the STC CIT Dashboard will receive two Welcome emails:

1. The first email will contain the new username and notes that an additional email containing an initial temporary password will follow within the next 24-48 hours.

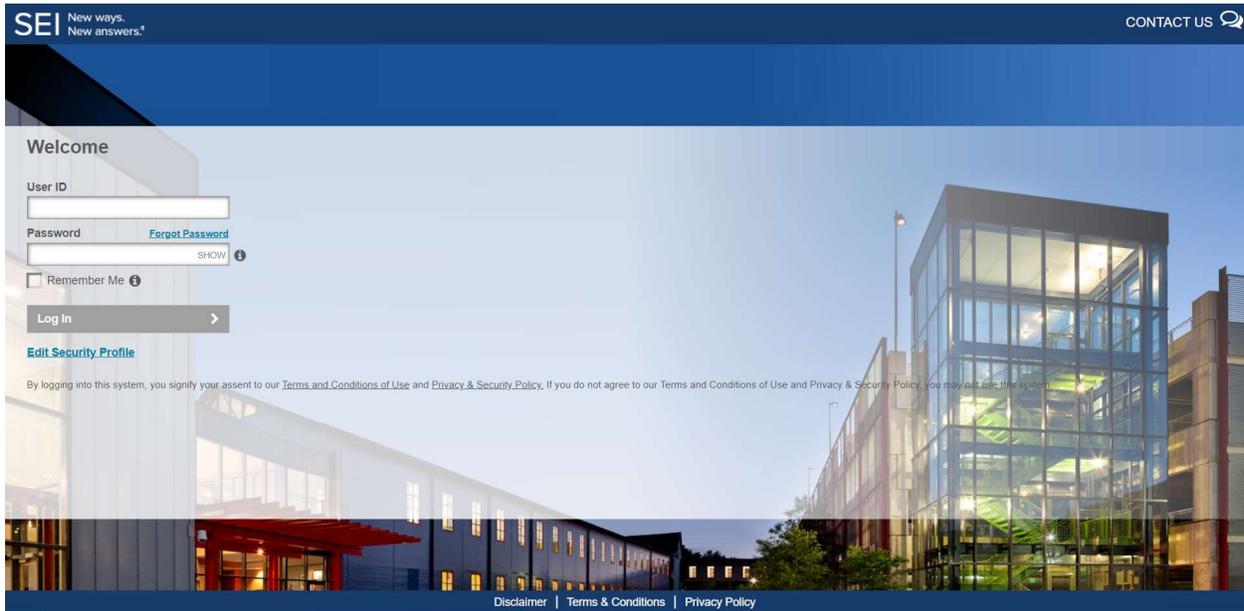


2. The second email will contain the initial temporary password as well as a link to the STC CIT Dashboard.

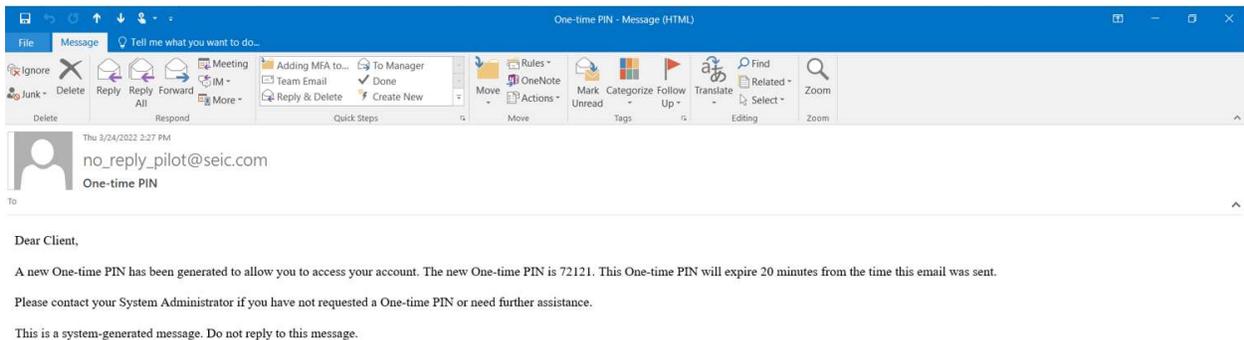




After clicking the initial login link, the user will be directed to the login page for the STC CIT Dashboard. The user will need to enter the username provided in the first welcome email and the initial temporary password that was provided in the second welcome email and click the *Log In* button.

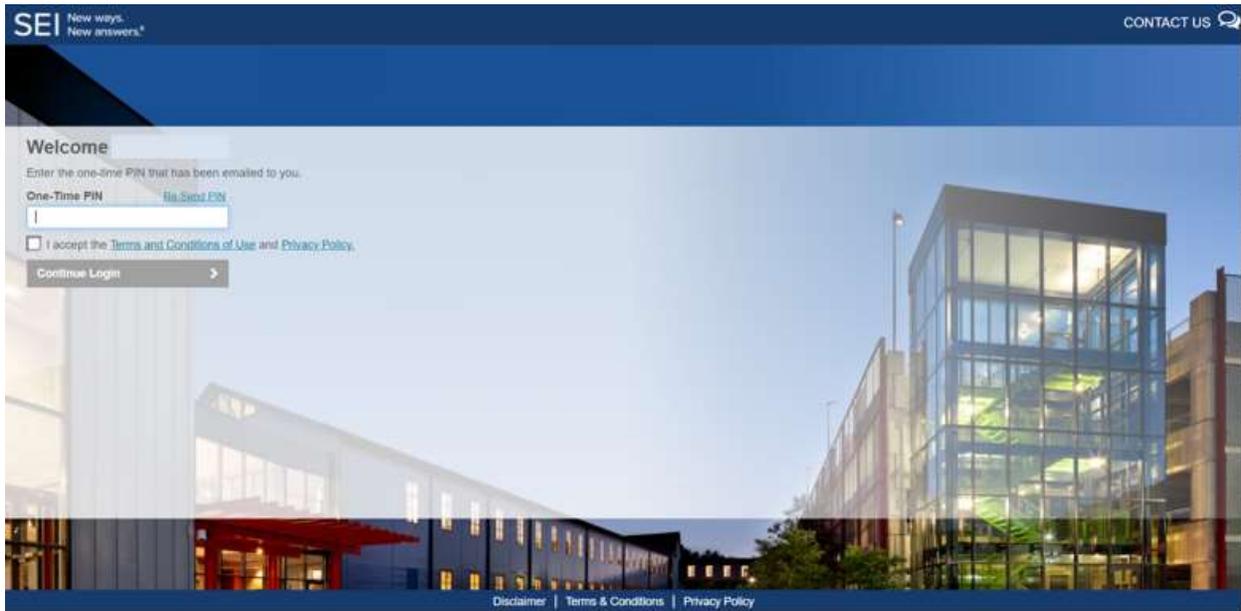


An email containing a one-time pin will be generated and sent to the user.

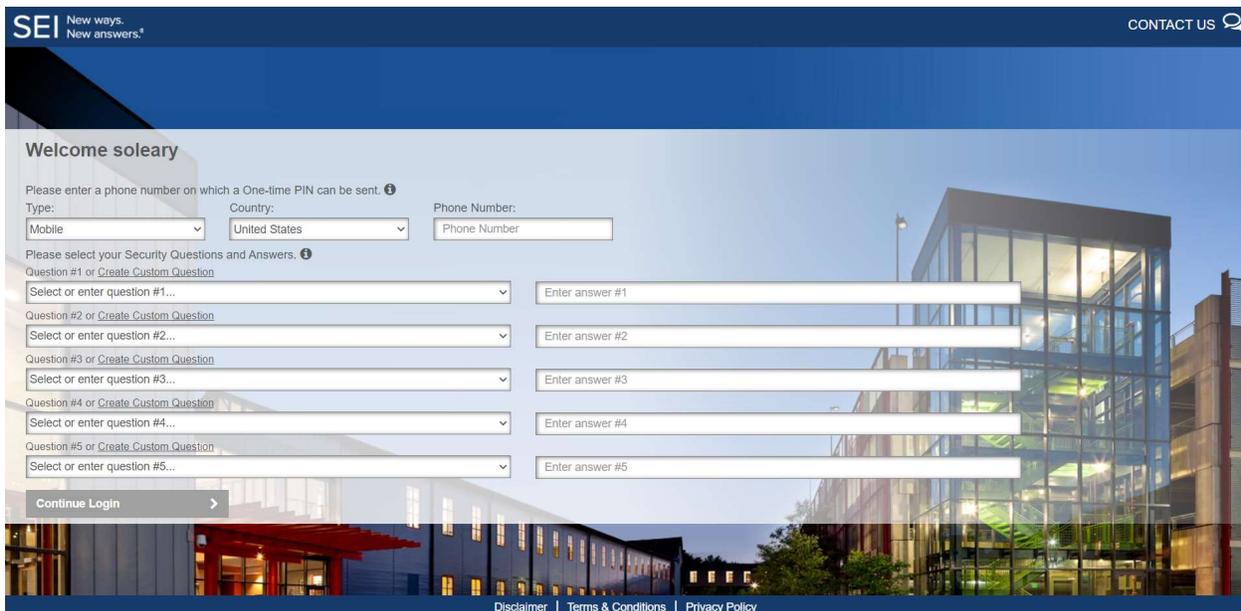




The user will enter the one-time pin and click the *Continue Login* button



The user will be brought to a screen to enter their phone number and set up security questions and answers.





Users can choose from pre-defined security questions or choose to create custom security questions using the below criteria.

Security Questions ✕

Security Questions and Answers cannot be repeated. Answers must be between 2 and 20 characters. No special characters are permitted. Questions and Answers must not have exact matching words. Custom Questions must contain at least two words.

After providing phone numbers and setting up security questions and answers, the user will be prompted to create and confirm a new password.

SEI New ways. New answers. CONTACT US

Welcome soleary

Please create and confirm your new Password.

Enter your new Password:

SHOW

Confirm your new Password:

SHOW

Continue Login >

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Users must adhere to the following Password Rules:

Password Rules



Please select your new Password.

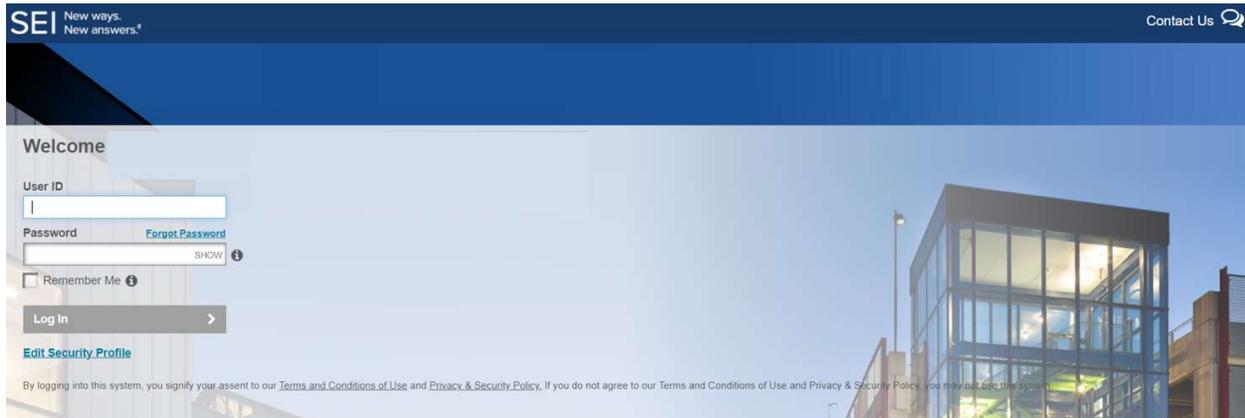
- Passwords must be between 8 and 20 characters.
- Passwords must contain at least one number, one upper case character and one lower case character.
- Passwords must have no more than two repeating characters.
- Passwords must not contain User ID.
- Passwords must not contain your first or last name.
- Password must not be the same as any of your last five Passwords.

The user will be granted access to the STC CIT Dashboard upon successful set up of new password.



II. Resetting Your Password

Users can reset their password from the STC CIT Dashboard login page by entering their username and clicking the *Forgot Password* link.



The user will be prompted to answer 2 security questions that were previously created during the initial setup.

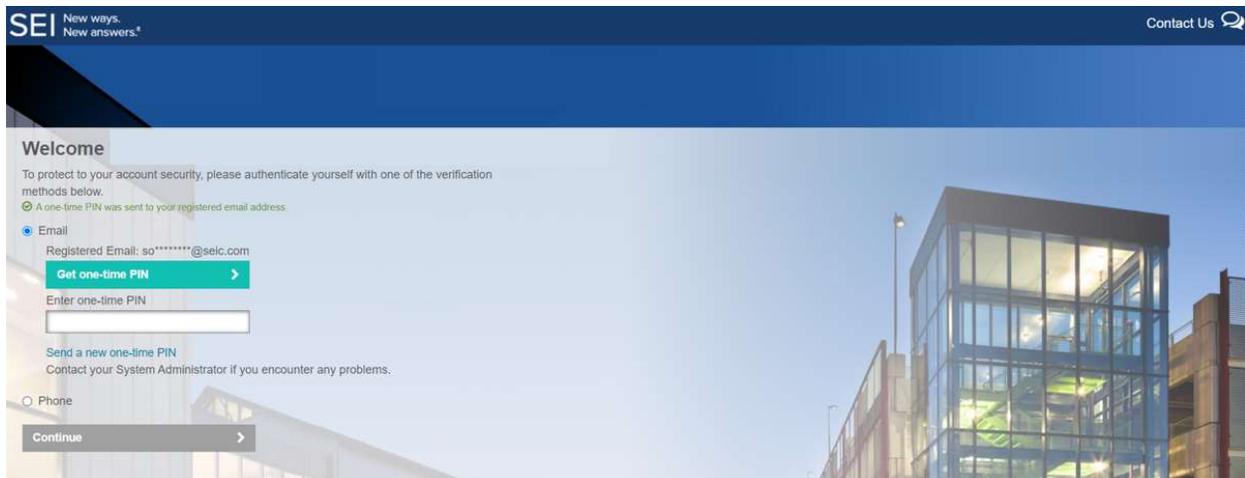




The user will need to authenticate their identity by choosing to receive a one-time pin via email or phone number provided during initial setup and click *Continue*.



The user will enter the pin that was delivered via email, phone call, or phone SMS message and click *Continue*.





The user will create a new password and confirm the password before clicking to *Continue Login* button.

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New answers.[®] Contact Us

Welcome to the SEI ETF Order Taking Platform soleary@seic.com

Please create and confirm your new Password.

Enter your new Password: SHOW ⓘ

Confirm your new Password: SHOW

Remember Me ⓘ

Continue Login >

The user's new password must adhere to the following password rules:

Password Rules



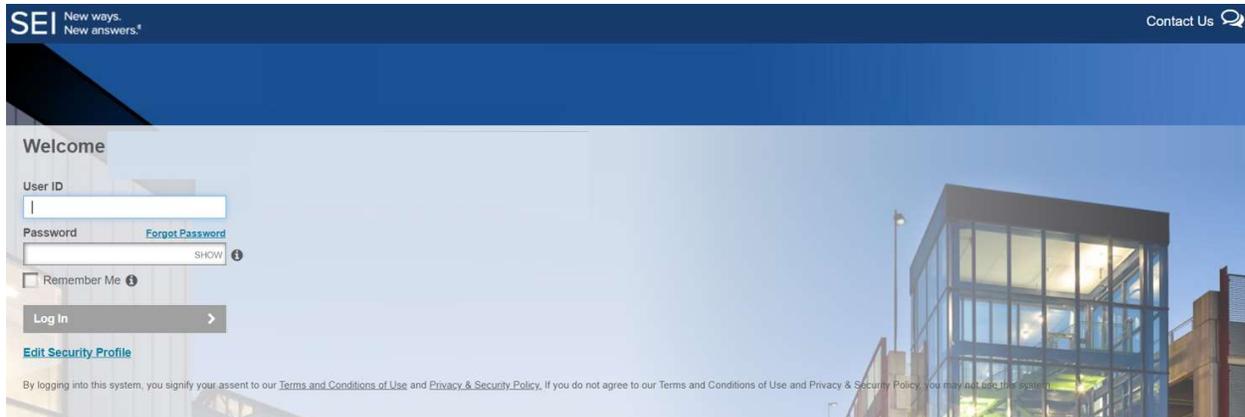
Please select your new Password.

- Passwords must be between 8 and 20 characters.
- Passwords must contain at least one number, one upper case character and one lower case character.
- Passwords must have no more than two repeating characters.
- Passwords must not contain User ID.
- Passwords must not contain your first or last name.
- Password must not be the same as any of your last five Passwords.

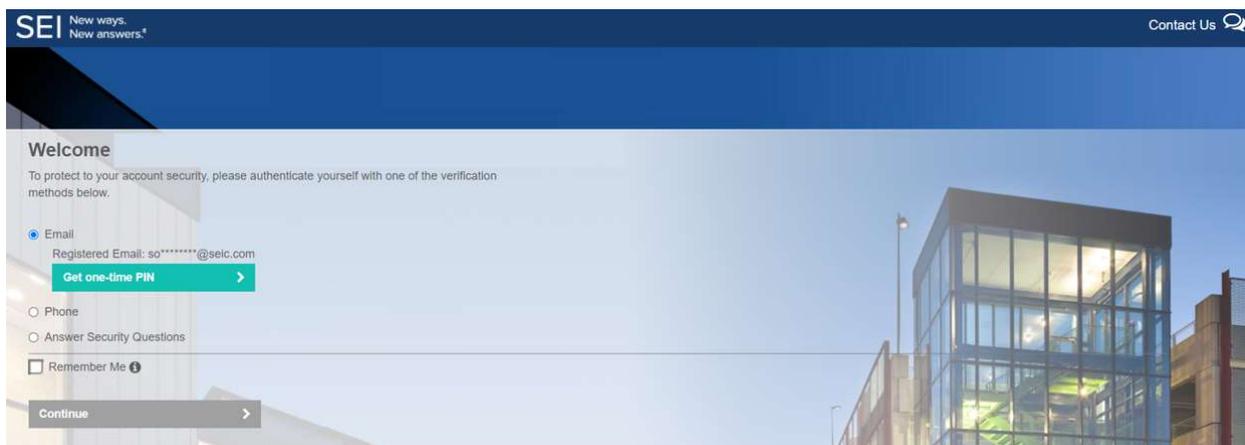


III. Updating Security Questions and/or Phone Number

Users can update their Security Questions and/or phone number from the STC CIT Dashboard login page by entering their User ID and Password and clicking the *Edit Security Profile* link.

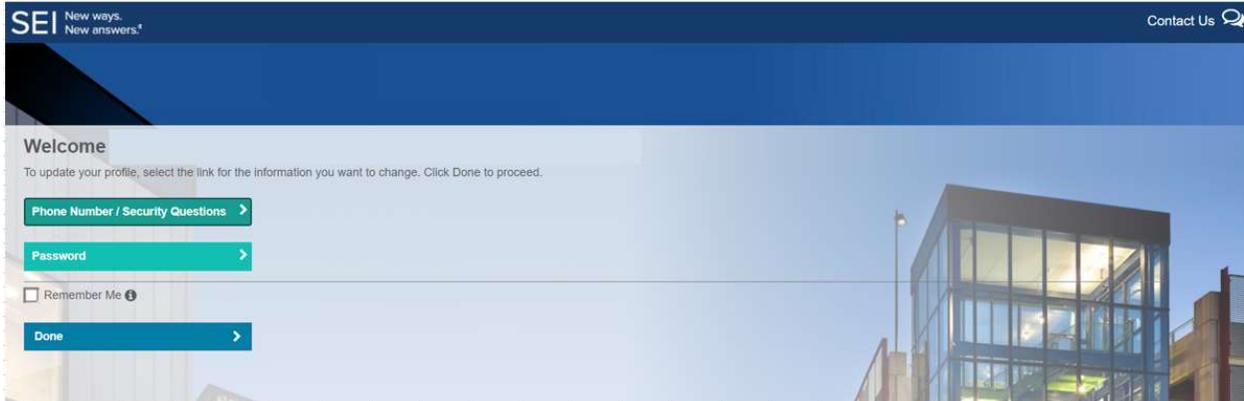


The user will need to authenticate their identity by choosing to receive a one-time pin via email or phone number provided during initial setup OR by answering existing security questions.

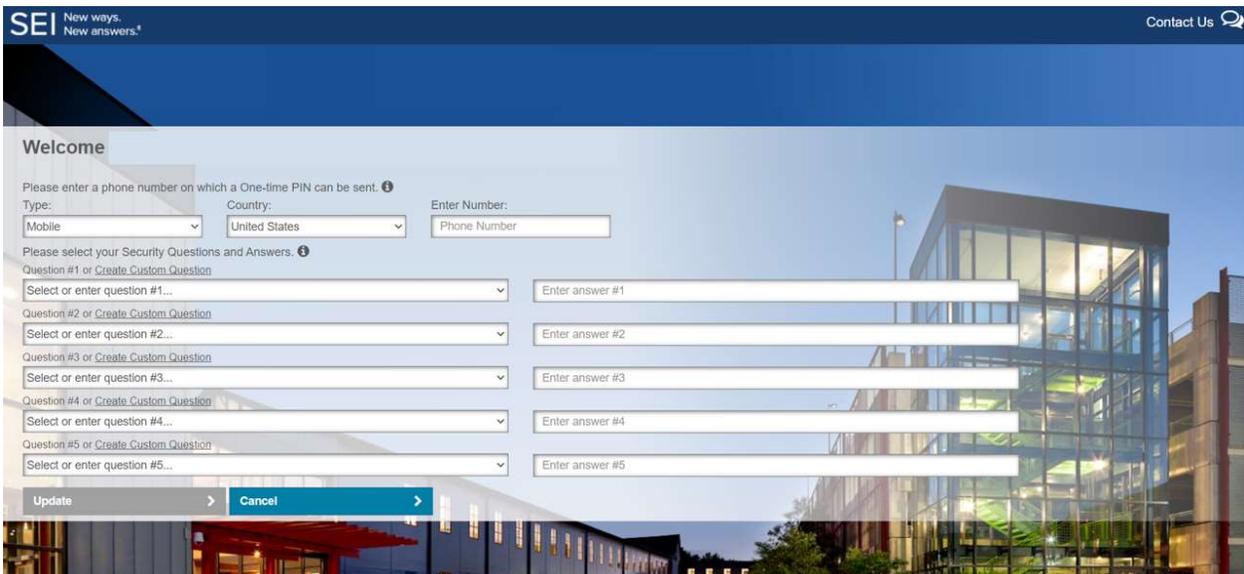




After the user has been authenticated, the user will click on the Phone Number/Security Questions button.



The user will be able to edit an existing phone number and/or edit existing security questions and answers. Once all necessary changes have been made, the user will click the update button to continue.





The user must adhere to the Security Questions Criteria noted below:

Security Questions ✕

Security Questions and Answers cannot be repeated. Answers must be between 2 and 20 characters. No special characters are permitted. Questions and Answers must not have exact matching words. Custom Questions must contain at least two words.



IV. Troubleshooting

Contact Information

For all issues with password resets, suspended accounts, or locked accounts, please contact the SEI Service Desk for assistance by calling (610)-676-2369 and choosing menu option #2.

For all other inquiries, please contact CITTRADE@seic.com or call (610)-676-2369 and choose menu option #3.