

Client Point Quick Start Guide

Accessing Your Account

The link for Client Point can be found at our website, www.countryclubtrust.com, under "Login to my accounts" in the upper right corner.

Initial Client Point Login

The first time you log in you'll be prompted to enroll in Secure Sign On. Secure Sign On is a service to help protect you from fraudulent online activity. During the enrollment process, you will be asked to supply some personal information and create a new password.

1 Log in with your Access ID and Password.

Welcome to Client Point!

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.

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

Country Club Trust Company Client Point

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](#).



2 Complete 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

3 After your security enrollment, you will be prompted to enter a new password. Please note the password requirements, and then click Enroll.

New Password Required

[FAQ](#)

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:

Client Agreement

You will be prompted to accept the terms and conditions of use of the site. Selecting *I accept the terms of the agreement* completes the Log In process, and provides access to the site and your account information. If you want to review the terms, select the link provided to view the details. If you choose not to agree by selecting *I decline the terms of the agreement*, you will not gain access and will be reverted to the initial Log In page.

Accept the Terms and Conditions of the Agreement below to sign in

Please select from the options below, and click "Continue".

I accept the terms of the agreement

I decline the terms of the agreement

[View the Terms and Conditions of the Online Client Agreement](#)

This version of the Online Client Agreement was last updated on:

Subsequent Client Login

Subsequent logins are fast and easy when accessing the site from the same device. During the Log In process, we not only validate your access ID and password, we also analyze numerous elements regarding your device to ensure your identity. When we experience a change in your device, you may be required to complete an additional step in the Log In process by entering a one-time security code to validate your identity or by opting to answer challenge questions. The one-time security code can be delivered through a **telephone call** or **text message**. If you do not have access to a telephone, you can **opt to answer challenge questions**.

If you have questions please contact your account officer at 816-751-4200.