

ClientConnections Overview



Registration and Sign-in



Sign-in to WatersEdge Ministry Services Online Account Access

) If this is your first time signing in, please register here

Enter your **username**

Username

Continue

I forgot my username

I forgot my password

(2) If you are having trouble signing in, contact us at 866.693.8369

WatersEdge Ministry Services

- You must register your organization's account before you begin using ClientConnections. To complete registration, you'll need the temporary username and temporary password recently provided to you by letter.
- 2. We want to make your ClientConnections experience easy. Please don't hesitate to contact us if you have any questions during the registration or sign-in process.



Homepage

WatersEdge	📈 Account Summary		📛 Statements & Notices		🗙 Payments & Transfers		First Baptist Last Login: 02/07/20	
Search Account History	Account Summary : 00000000 - (First Baptist)							My Settings
	Account Type Rate		Current Balance		Available for Withdrawal			Logout
From this account CD - 101	Investment Summary : 00000000 - (First Baptist)							/
Search	Investr	nent	Rate	Maturity Date	Dividend at Maturity	Balance		
More Information	101 One Year Ter	m Investment	2.220%	08/18/2018	\$98.31	\$4,415.87 >		
Apply for a Loan	201 Two Year Ter	m Investment	2.610%	12/20/2019	\$130.71	\$2,500.00 >		
Term Investment Rates	202 Two Year Ter	m Investment	2.520%	01/27/2018	\$52.92	\$1,047.23 >		
	203 Two Year Ter	rm Investment	2.440%	04/27/2018	\$75.80	\$1,551.54 >		
Contact Us	204 Two Year Ter	rm Investment	2.310%	05/27/2018	\$94.52	\$2,042.48		
866-693-8369	205 Two Year Ter	m Investment	2.370%	11/20/2018	\$97.15	\$2,046.16		
C Linai Os	206 Two Year Ter	m Investment	2.510%	12/26/2018	\$106.14	\$2,110.95		
	1 More Inf Our Web Apply for Term Inve Contact 866-0 Emai	formation site a Loan estment Rate Us 593-8369 I Us	es		2 First Bapt Last Login: 02/07 My Settings Logout	ist ▼ /2018		

ClientConnection's homepage is your starting point to access all services offered through the website.

- On the left of the homepage you'll find More Information. Use this to visit our website (WatersEdgeAdvisors.org), apply for a loan, or check Term Investment rates.
- 2. On the right of the homepage you'll see your organization's name (assigned by you during the registration process). Click your organization's name to reveal the My Settings and Logout menu options.



Account Summary

الحمد Account Summary		🚆 Statements & Notices		🔀 Payments & Transfers			
Acc	ount Summary : 0000	0000 - (First Ba	aptist)				
Account Type Rate		Current B	alance	Available for Withdrawal			
Inve	estment Summary : 0	0000000 - (Firs	t Baptist)				
	Investme	nt	Rate	Maturity Date	Dividend at Maturity	Balance	
	101 One Year Term	Investment	2.220%	08/18/2018	\$98.31	\$4,415.87	>
	201 Two Year Term	Investment	2.610%	12/20/2019	\$130.71	\$2,500.00	>
	202 Two Year Term	Investment	2.520%	01/27/2018	\$52.92	\$1,047.23	>
	203 Two Year Term	Investment	2.440%	04/27/2018	\$75.80	\$1,551.54	>
	204 Two Year Term	Investment	2.310%	05/27/2018	\$94.52	\$2,042.48	>
	205 Two Year Term	Investment	2.370%	11/20/2018	\$97.15	\$2,046.16	>
	206 Two Year Term	Investment	2.510%	12/26/2018	\$106.14	\$2,110.95	>
	207 Two Year Term	Investment	2.620%	01/27/2019	\$111.55	\$2,125.62	>
	208 Two Year Term	Investment	2.660%	02/17/2019	\$111.40	\$2,091.73	>
	209 Two Year Term	Investment	2 550%	03/20/2019	\$106.80	\$2 091 73	1

04/20/2019

2.610%

At the center of the homepage you will find ClientConnection's main navigation options: Account Summary, Statements & Notices, and Payments & Transfers.

Account Summary will allow you to view your organization's Enhanced Cash Fund, Term Investment and Church Building Loan accounts.

\$2,094.52

\$109.51



210 Two Year Term Investment

Statements & Notices

ا <u>۳</u> Account Summary	🛗 Statements & Notices	🔀 Payments & Transfers					
E-Notices							
Click on the date below to see the notice available for your account.							
Available Notices							
There are currently no notices available for your account.							
If you would like to start or stop receiving E-Notices, <u>update your settings.</u>							
E-Statements Click on the date below to see the statement available for your account.							
Available Statements							
There are currently no statements available for your account.							

Statements & Notices provides access to E-Notices and E-Statements. Clicking on individual statements will allow you to review, print, or save these documents. You may choose to stop receiving these statements by updating your settings.



Payments & Transfers

ces 🛛 🗙 Pa

🔀 Payments & Transfers

Quick Navigation

WatersEdge

Transfer Funds Redeem Investment New Investment

More Information

Term Investment Rates

Our Website Apply for a Loan

Redeem / Reallocate

To complete your Investment Redemption, please fill out the following inputs below. If you need help filling in the correct information please contact us at 866-693-8369. Thank you

Investment Summary

Account Type	Maturity Date	Rate	Accrued Interest	Available Amount
CD - 0000000101 0One Year Term Inves	08/18/2018	2.220%	000000101	\$4,415.87
CD - 0000000201 0Two Year Term Inves	12/20/2019	2.610%	000000201	\$2,500.00
CD - 0000000911 0One Month Term Inve	03/05/2018	1.570%	000000911	\$10,000.00

What type investment redemption would you like to run?

Select account:

What action would you like to take?

C	Transfer to Enhanced Cash Fund	O Withdraw Funds	Reallocate Funds	Reallocate & Withdraw

Enter reallocation amount

%

*** If you want to provide more specific instructions, please contact us at 866-693-8369 or info@watersedgeadvisors.org. ***

Redeem Investment

Payments & Transfers features a Quick Navigation bar on the left. Use these options to select ACH origination, transfer funds, redeem or reallocate an investment, or create a new investment.

- If you select ACH Origination, you can make a loan payment or withdraw/add money to your Enhanced Cash Fund.
- If you choose Transfer Funds, you can transfer from your Enhanced Cash Fund to make a loan payment.
- You may redeem or reallocate a current Term Investment.
- You may create a new Term Investment.



Thank You

We want ClientConnections to make it easier to manage your ministry's finances. While this overview covers the basics, our Ministry Services team is ready to provide detailed one-on-one help. If you have questions or are having difficulty navigating ClientConnections, please contact Sam Youngs or Cindy Kralik.

Sam Youngs Ministry Services Officer syoungs@WatersEdgeServices.org 405.416.5765

Cindy Kralik Administrative Assistant ckralik@WatersEdgeServices.org 405.400.8129

Toll Free 866.693.8369

