

BENEFICIARY ONBOARDING

Welcome to your Trust Portal.

A quiet, secure place to see your trust, hear from your trustee, and act on what matters to your family.

Prepared for:

Named beneficiaries of DeBellotte Global trusts

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Format: Companion guide

WHAT THIS GUIDE COVERS

What to expect

This guide walks you through everything from the moment your trustee sends you an invitation, to activating your account, securing it with two-factor authentication, and using each section of the Beneficiary Portal. The steps and language here match what you will see on screen and in the interactive tour that runs on your first login.

PART ONE

Activating your account

Six short steps, from invitation email to signed-in portal. Plan on about ten minutes and keep your phone nearby — you will need it for two-factor authentication.

- 1 Receive your invitation**

Your trustee sends a personal invitation to the email address on file. The message comes from a DeBellotte Global address and contains a secure one-time link. If it does not arrive within a day, check junk or spam folders before contacting the trustee office.
- 2 Create your account**

Open the invitation link on a device you trust. You will be asked to confirm your identity, choose a strong password, and accept the portal terms. Use a password you do not reuse anywhere else.
- 3 Set up two-factor authentication**

For your protection, every beneficiary account uses an authenticator app. Install Google Authenticator, Microsoft Authenticator, or 1Password on your phone before continuing.
- 4 Scan the QR code**

The portal will display a QR code. Open your authenticator app, choose “Add account” and scan the code. Your app will create a DeBellotte Global entry that refreshes every 30 seconds.

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Enter the six-digit code

Type the current six-digit code from your authenticator app into the portal to confirm the pairing. From now on, you will be asked for a fresh code every time you sign in.

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Sign in and enter your portal

You will land on your portal home. Take a moment to look around — the interactive tour runs automatically on your very first visit and can be restarted at any time from How It Works.

PART TWO

Using the portal

The portal is organised around a small number of clear sections. Each one answers a specific question you might have about your trust.

Trust Overview

See the trusts you are named in, the trustee of record, jurisdiction, inception date, and current status. Any recent updates published by the trustee appear here first.

Trustee Information

Contact details, office hours, and the named point of contact for your trust. This is the right place to check who to write to about a specific question.

Trust Documents

A read-only vault of the trust deed, amendments, statements, and reports the trustee has released to you. Documents can be viewed on screen or downloaded for your own records.

Distribution Requests

Submit a new request, track the status of pending requests, and review the history of past distributions. Each request is reviewed by the trustee against the terms of the deed.

Communications

A private message thread with the trustee office. Use it for anything that is not urgent — questions about a statement, a document, or an upcoming meeting.

Profile & Security

Update your contact information, change your password, review the devices signed in to your account, and reset two-factor authentication if you change phones.

PART THREE

Privacy and security

Your portal is private by design. A short set of principles guides how your information is handled.

Named beneficiaries only

Access is restricted to individuals the trustee has personally invited. There is no public sign-up.

Two-factor by default

Every login requires both your password and a fresh code from your authenticator app. The trustee will never ask you for that code.

Least-privilege visibility

You see only the trusts you are named in, and only the documents the trustee has released to you. Other beneficiaries' information is never visible to you.

No unsolicited contact

The trustee will never call, text, or email you asking for your password, recovery codes, or account access. Treat any such request as suspicious and report it.

If something feels wrong

If you receive an unexpected message, cannot sign in, or suspect your account has been accessed by someone else, contact the trustee office at your usual channel and, if possible, from a device other than the one you are worried about. Your trustee would rather hear from you once too often than once too late.