U.S. Bank adds investor experience to Pivot

Launch date: 4.27.2018

What changed and why?

Trust Investor Reporting (TIR) user feedback received via day-to-day interactions and independent third-party research told us we needed to:

(1) Modernize our investor reporting platform, providing the user experience and data transparency users expect today.
(2) Simplify deal and report access by providing real-time access to investors, enabling bulk requests, and putting U.S. Bank contact information front and center.
(3) Put all important reports, governing documents and payment information in one, centralized location for download.

What you need to know:

(1) The portfolio and notifications you have in TIR have been transferred to Pivot.
(2) If you go to TIR and log in, you will be redirected to Pivot and asked to register. If you try to log in directly to Pivot, you'll be asked to register prior to getting access.
(3) Please contact us at usbankpivot@usbank.com if you have any questions.

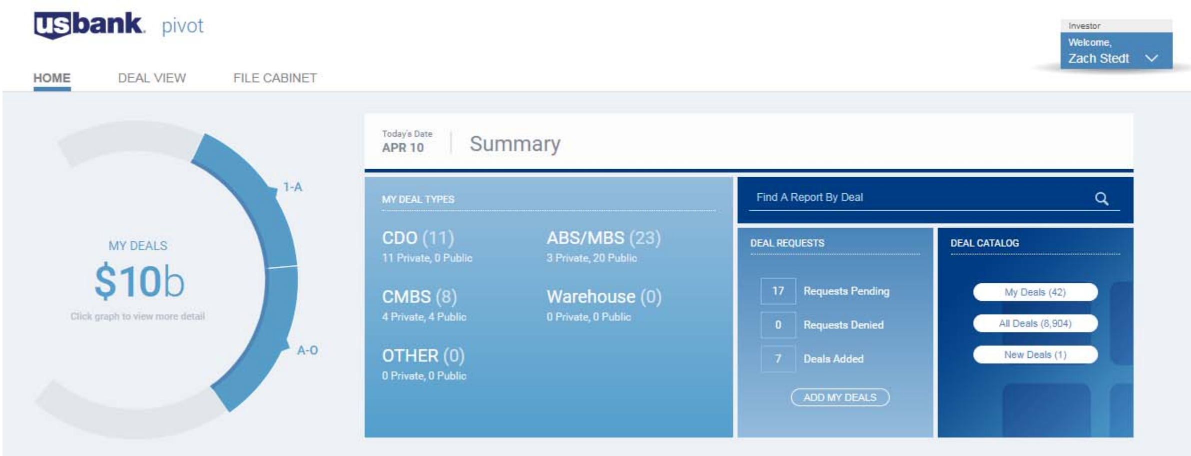
What you need to do:

(1) Bookmark Pivot: pivot.usbank.com.
(2) Confirm that you are using a modern browser. Pivot is designed to work best with Chrome, Firefox and the latest version of Internet Explorer (IE11).
(3) Review Deals and Alerts: Click on 'Welcome' in the top right of Pivot then select 'My Profile.' Review My Deals, Notifications, and Posted Files to see your portfolio and settings. Recommendation: Keep all online alerts to 'On.' Be more selective with email alerts.
(4) Add Deals: Click 'Add My Deals' in Deal Requests on the home page to search for deals or upload CUSIPs in bulk to request access.
(5) Scan through FAQs: You can find them by clicking on 'Welcome' and then 'Help.'

Learn more about the investor experience:

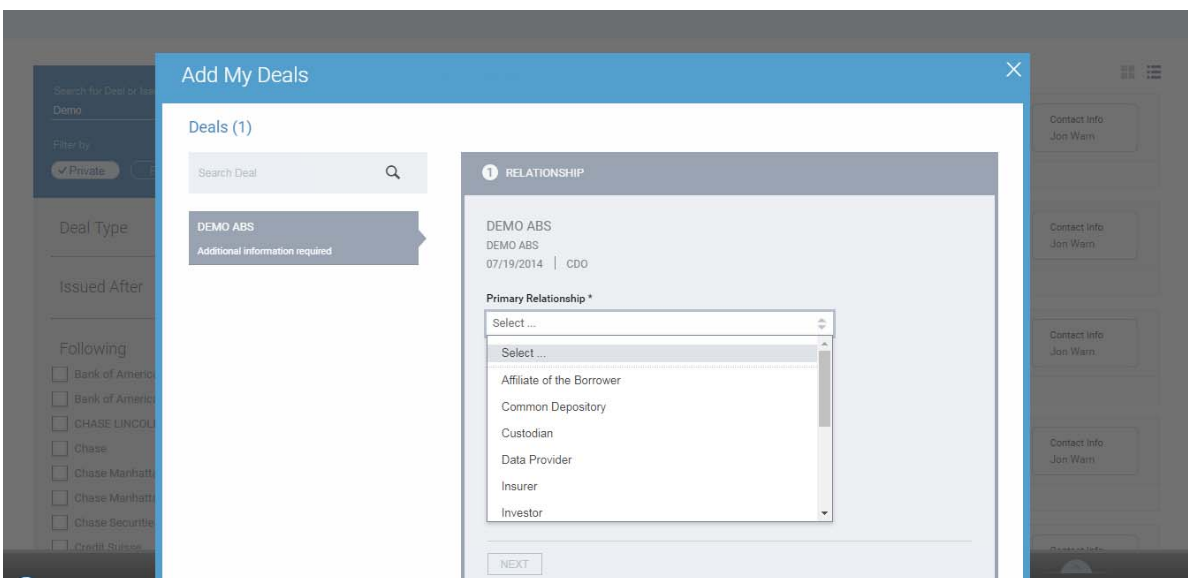
On the next few pages, we provide more details and screenshots for key features and modules in the new experience.

Dashboard and Deal View



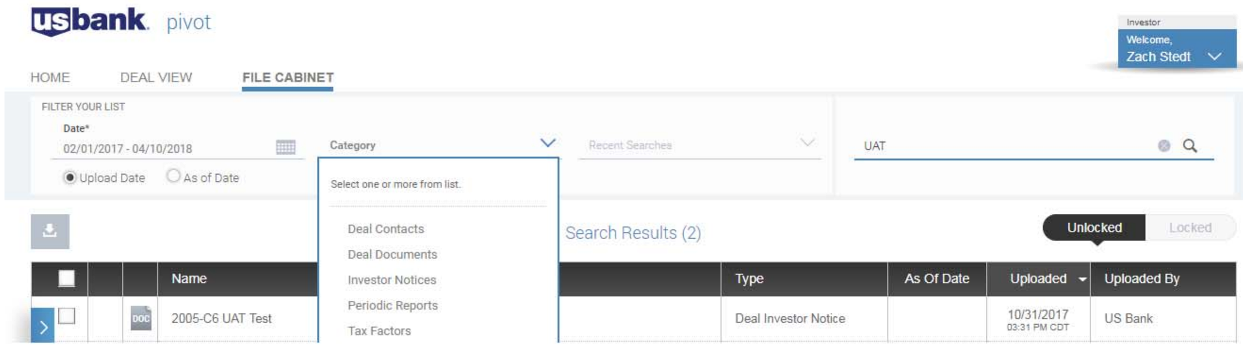
(1) View your portfolio deal types, total note balance and deal request status.
(2) Search for reports by entering deal name in ‘Find a Report By Deal.’
(3) View Deal Catalog by clicking on ‘My Deals,’ ‘All Deals’ or ‘New Deals.’
(4) Click on wheel infographic to view payment and contact information for your deals.
(5) Once viewing a deal, click on eye or Deal Reports for more detailed information.

Add Deals to Portfolio:



(1) Click on ‘Add My Deals’ in the Dashboard or navigate to ‘Deal View’ to search public and private database to add deals to your portfolio.
(2) Add My Deals allows you to request access to more than one deal at a time. Bulk requests can be submitted by adding CUSIPs to the template provided and uploading.
(3) Investors can submit position data and get real-time access without forms or fuss.

Posted Files and File Cabinet:



(1) Navigate to ‘Posted Files’ on the home page, choose today/this week/this month, then click ‘Download’ to get all portfolio files in one click.
(2) For more comprehensive view of current and historical reports and documents, navigate to the File Cabinet.
(3) In the File Cabinet, apply filters by date, type and recent search. Search and filters work together to get you the files you want quickly.
(4) Request access to restricted reports and documents using the Locked tab. Unlocked reports will appear in your File Cabinet once you have access to a deal.

Next steps:

(1) Log in and check out the new investor experience at: pivot.usbank.com.
(2) Please contact us at usbankpivot@usbank.com if you have any questions.