

TOL, Inc. Shareholder Portal Feature Guide

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Important Notice

The information in this document is for informational purposes only and is not intended to be legal, financial, or other form of advice and no legal or business decision should be based on its content.

Introduction

Welcome to the Transfer Online Login System documentation. This manual provides comprehensive instructions for managing your shareholder account through the TOL platform.

The TOL Login System provides shareholders with secure online access to:

- View and download stock holdings
- Track dividend payments
- Access invoices and payment history
- View proxies
- Manage account access permissions

Looking for the Web Version?

See [Web Version – TOL Login System User Manual¹](#) for more details.

¹ <https://docs.shareholder.manual.tol-solo.com/index.html>

I Registration

This section guides you through updating your account registration information in the TOL Login System.

I.1 Accessing Your Account Information

To update your registration details, you'll need to navigate to your account settings page.

Step 1: Navigate to My Accounts

Access your account overview page where you can manage all your TOL account information.



Fig. 1: My Accounts overview page

Step 2: Access Registration Settings

Click the registration update link to access your account details.

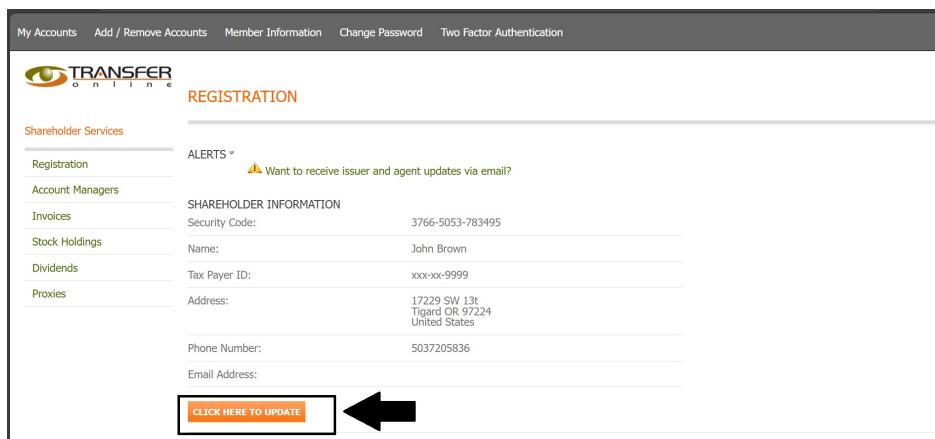


Fig. 2: Click here to update your registration information

Action Complete

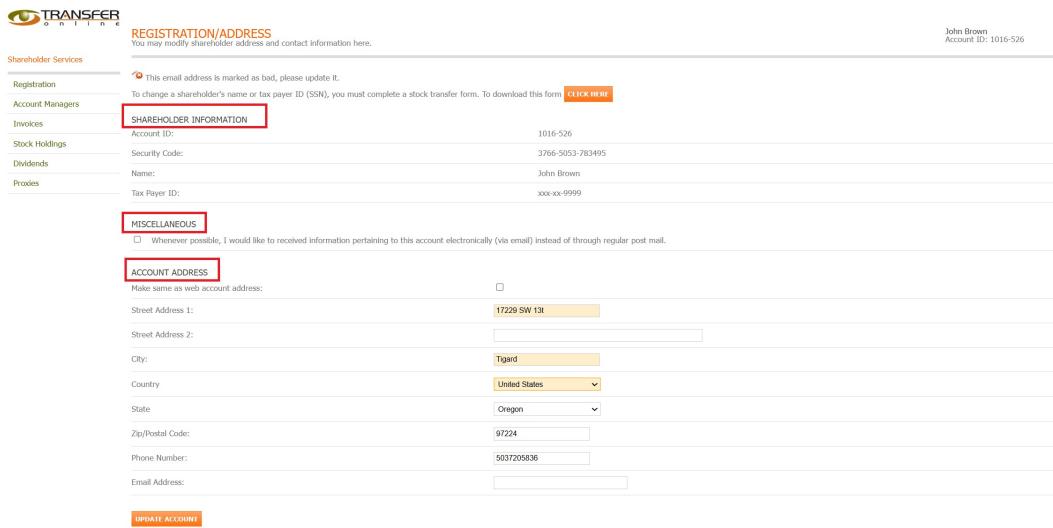
You have successfully navigated to the registration update page.

I.2 Updating Your Information

The registration page is organized into distinct sections for easy navigation and updates.

Step 3: Review Basic Information Categories

The registration form displays three main categories of information that you can update.



The screenshot shows a registration form for 'SHAREHOLDER SERVICES'. At the top right, it displays 'John Brown' and 'Account ID: 1016-526'. The form is divided into three main sections, each with a red box around its title:

- SHAREHOLDER INFORMATION**: Contains fields for Account ID (1016-526), Security Code (3766-5053-783495), Name (John Brown), and Tax Payer ID (xxx-xx-9999).
- MISCELLANEOUS**: Contains a checkbox for receiving information electronically instead of through regular post mail.
- ACCOUNT ADDRESS**: Contains fields for Street Address 1 (17229 SW 13th), Street Address 2, City (Tigard), Country (United States), State (Oregon), Zip/Postal Code (97224), Phone Number (5037209836), and Email Address.

At the bottom left is an 'UPDATE ACCOUNT' button.

Fig. 1: Three main categories of registration information

These categories are:

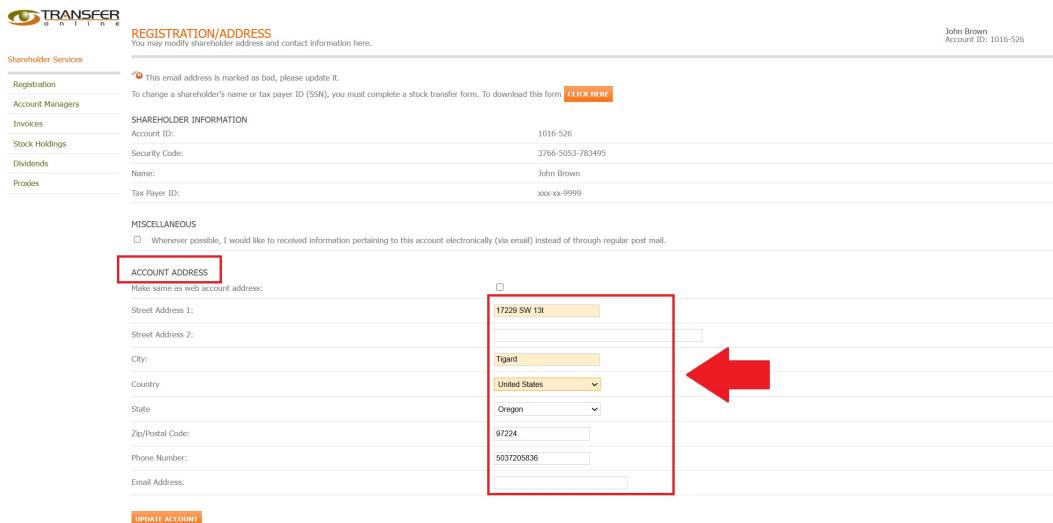
- **Shareholder Information** - Contains your personal or entity details
- **Miscellaneous** - Additional account settings and preferences (see Step 5)
- **Account Address** - Your registered mailing address (see Step 4)

Note

Each category contains specific fields relevant to your account type and status.

Step 4: Update Address Information

Complete or update your address details in the designated fields.



REGISTRATION/ADDRESS
You may modify shareholder address and contact information here.

Shareholder Services

Registration
Account Managers
Invoices
Stock Holdings
Dividends
Proxies

SHAREHOLDER INFORMATION
Account ID: 1016-526
Security Code: 3766-5053-783495
Name: John Brown
Tax Payer ID: xxx-xx-9999

MISCELLANEOUS
 Whenever possible, I would like to receive information pertaining to this account electronically (via email) instead of through regular post mail.

ACCOUNT ADDRESS
Make same as web account address:

Street Address 1: 17229 SW 131
Street Address 2:
City: **Tigard**
Country: **United States**
State: **Oregon**
Zip/Postal Code: 97224
Phone Number: 5037205836
Email Address:

UPDATE ACCOUNT

Fig. 2: Address information fields

See Also

Ensure your address is current to receive important shareholder communications and documentation.

Step 5: Configure Additional Options

Review and update miscellaneous settings including web access preferences.



MISCELLANEOUS
 Whenever possible, I would like to receive information pertaining to this account electronically (via email) instead of through regular post mail.

Fig. 3: Additional registration options and preferences

I.3 Saving Your Changes

After making all necessary updates, you must save your changes to ensure they are applied to your account.

Step 6: Review All Information

Before saving, review all sections to ensure your information is accurate and complete.

SHAREHOLDER INFORMATION	
Account ID:	1016-526
Security Code:	3766-5053-783495
Name:	John Brown
Tax Payer ID:	xxx-xx-9999
MISCELLANEOUS	
<input type="checkbox"/> Whenever possible, I would like to received information pertaining to this account electronically (via email) instead of through regular post mail.	
ACCOUNT ADDRESS	
Make same as web account address:	<input type="checkbox"/>
Street Address 1:	512 Southeast Salmon Street
Street Address 2:	
City:	Portland
Country	United States
State	Oregon
Zip/Postal Code:	97214
Phone Number:	
Email Address:	

UPDATE ACCOUNT 

Fig. 1: Complete registration form ready for submission

Important

Double-check all entered information for accuracy. Incorrect information may delay important communications or affect your account access.

Step 7: Save Your Updates

Click the Update button to save all changes to your registration information.

My Accounts Add / Remove Accounts Member Information Change Password Two Factor Authentication

TRANSFER
online

REGISTRATION

Shareholder Services

Registration

ALERTS Want to receive issuer and agent updates via email?

SHAREHOLDER INFORMATION

Security Code: 3766-5053-783495

Name: John Brown

Tax Payer ID: xxx-xx-9999

Address: 17229 SW 13th, Tigard OR 97224, United States

Phone Number: 5037205836

Email Address: [redacted]

CLICK HERE TO UPDATE

Fig. 2: Click the Update button to save your changes

Action Complete

Your registration information has been successfully updated. You will receive a confirmation message once the changes have been processed.

I.4 Next Steps

After updating your registration:

- Return to the My Accounts page to verify your changes
- Check your email for any confirmation messages
- Contact support if you encounter any issues with your updates

II Stock Holdings

This section guides you through viewing and managing your stock holdings in the TOL Login System.

II.1 Overview

The Stock Holdings section provides comprehensive access to your investment portfolio, including:

- Real-time view of all stock certificates and holdings
- Detailed certificate information and history
- Official holdings statements for tax and legal purposes

II.2 Accessing Stock Holdings

To access your stock holdings information, navigate to the Stock Holdings section from the main navigation menu.

Step 1: Locate Stock Holdings in Navigation

Find and click the Stock Holdings option in the left navigation menu.

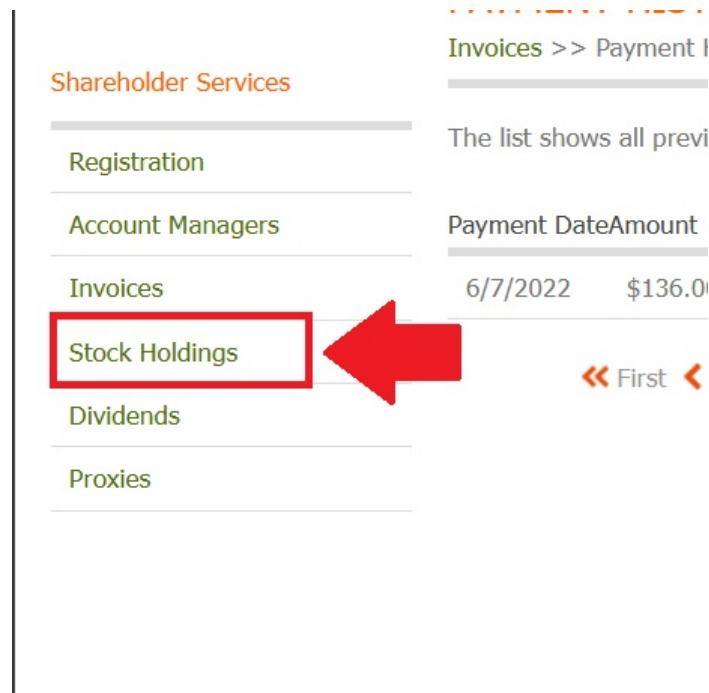


Fig. 1: Stock Holdings location in the navigation menu

Action Complete

You have successfully navigated to the Stock Holdings section.

II.3 Stock Holdings Dashboard

The main Stock Holdings page displays a comprehensive overview of your investment portfolio.

Step 2: Review Holdings Overview

Upon entering the Stock Holdings section, you'll see your complete holdings dashboard.

STOCK HOLDINGS
John Brown
Account ID: 1016-526

CERTIFICATES

Sort List By: View:

Certificate	Company	Security	Date Issued	Date Canceled	Restriction	Affiliate/Control	Stop	Shares
GATE-BOOK-16	Demo Company Inc	Common	02/27/2013		No Restriction	No		250
BOOK-764	Demo Company Inc	Common	06/24/2013		No Restriction	No		90,000
C-12936	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-761	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-762	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-763	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-771	Demo Company Inc	Common	11/01/2013		Rule 144	No		9,006
BOOK-1616	Demo Company Inc	Common	11/13/2014		Rule 144	No		27,018
BOOK-794	Demo Company Inc	Common	11/13/2014		No Restriction	No		270,930
C-12995	Demo Company Inc	Common	12/18/2014		No Restriction	No		50

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Demo Company Inc (ID: 347)

Common Outstanding Balance:	652,487
Options Outstanding Balance:	400
Preferred E Outstanding Balance:	652,487

Fig. 1: Stock Holdings main dashboard

Note

The dashboard displays all your holdings across different companies and security types. Each holding shows key information including certificate numbers, share quantities, and current status.

Step 3: Review Column Information

The holdings table includes essential information organized in columns for easy reference.

STOCK HOLDINGS

John Brown
Account ID: 1016-526

CERTIFICATES

Sort List By: View:

Company:

Certificate	Company	Security	Date Issued	Date Canceled	Restriction	Affiliate/Control	Stop	Shares
GATE-BOOK-16	Demo Company Inc	Common	02/27/2013		No Restriction	No	250	
BOOK-764	Demo Company Inc	Common	06/24/2013		No Restriction	No	90,000	
C-12936	Demo Company Inc	Common	06/24/2013		No Restriction	No	10	
BOOK-761	Demo Company Inc	Common	06/24/2013		No Restriction	No	10	
BOOK-762	Demo Company Inc	Common	06/24/2013		No Restriction	No	20	
BOOK-763	Demo Company Inc	Common	06/24/2013		No Restriction	No	20	
BOOK-771	Demo Company Inc	Common	11/01/2013		Rule 144	No	9,006	
BOOK-1616	Demo Company Inc	Common	11/13/2014		Rule 144	No	27,018	
BOOK-794	Demo Company Inc	Common	11/13/2014		No Restriction	No	270,930	
C-12995	Demo Company Inc	Common	12/18/2014		No Restriction	No	50	

« First < Previous 1 2 3 Next > Last »

Demo Company Inc (ID: 347)

Common Outstanding Balance:	652,487
Options Outstanding Balance:	400
Preferred E Outstanding Balance:	652,487

Fig. 2: Column headers showing available information categories

Table Columns

The holdings table includes the following key information:

- **Certificate [Number or Book Entry ID]** - Unique identifier for each holding
- **Company [Name]** - Issuing company
- **Security [Type]** - Type of security (common stock, preferred, warrants, etc.)
- **Date Issued** - Date when the certificate was originally issued
- **Date Canceled** - Date when the certificate was canceled or transferred
- **Restriction** - Any trading restrictions or legends on the shares
- **Affiliate/Control** - Indicates if holder is an affiliate or control person
- **Stop** - Transfer stop indicators preventing share movement
- **Shares** - Number of shares

II.4 Filtering and Sorting Options

The Stock Holdings section provides powerful filtering tools to help you navigate large portfolios.

Step 4: Select Company Filter

Use the company dropdown to filter holdings by specific companies in your portfolio.

Fig. 1: Company selection dropdown menu

Step 5: Sort Holdings Display

Use the **Sort List By:** dropdown to organize your holdings by various criteria.

STOCK HOLDINGS

John Brown
Account ID: 1016-526

CERTIFICATES

Sort List By: **Company**  Outstanding Shares

Company: Demo Company Inc  

Certificate	Company	Security	Date Issued	Date Canceled	Restriction	Affiliate/Control	Stop	Shares
GATE-BOOK-16	Demo Company Inc	Common	02/27/2013		No Restriction	No		250
BOOK-764	Demo Company Inc	Common	06/24/2013		No Restriction	No		90,000
C-12936	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-761	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-762	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-763	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-771	Demo Company Inc	Common	11/01/2013		Rule 144	No		9,006
BOOK-1616	Demo Company Inc	Common	11/13/2014		Rule 144	No		27,018
BOOK-794	Demo Company Inc	Common	11/13/2014		No Restriction	No		270,930
C-12995	Demo Company Inc	Common	12/18/2014		No Restriction	No		50

« First < Previous 1 2 3 Next > Last »

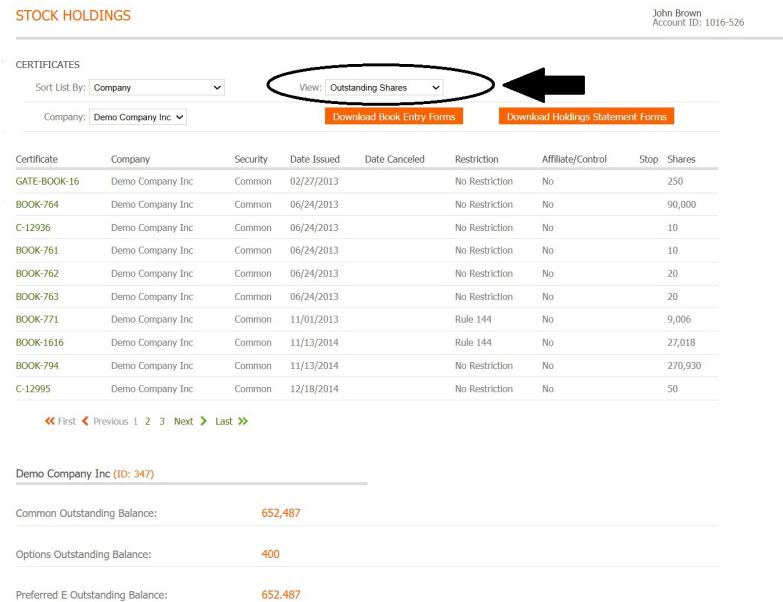
Demo Company Inc (ID: 347)

Common Outstanding Balance:	652,487
Options Outstanding Balance:	400
Preferred E Outstanding Balance:	652,487

Fig. 2: Sort options dropdown menu

Step 6: Filter by Security Type

Further refine your view by filtering holdings based on security types.



STOCK HOLDINGS

John Brown
Account ID: 1016-526

CERTIFICATES

Sort List By: Company

View: Outstanding Shares

Company: Demo Company Inc

[Download Book Entry Forms](#) [Download Holdings Statement Forms](#)

Certificate	Company	Security	Date Issued	Date Canceled	Restriction	Affiliate/Control	Stop	Shares
GATE-BOOK-16	Demo Company Inc	Common	02/27/2013		No Restriction	No		250
BOOK-764	Demo Company Inc	Common	06/24/2013		No Restriction	No		90,000
C-12936	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-761	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-762	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-763	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-771	Demo Company Inc	Common	11/01/2013		Rule 144	No		9,006
BOOK-1616	Demo Company Inc	Common	11/13/2014		Rule 144	No		27,018
BOOK-794	Demo Company Inc	Common	11/13/2014		No Restriction	No		270,930
C-12995	Demo Company Inc	Common	12/18/2014		No Restriction	No		50

[« First](#) [◀ Previous](#) [1](#) [2](#) [3](#) [Next](#) [» Last](#) [»»](#)

Demo Company Inc (ID: 347)

Common Outstanding Balance: **652,487**

Options Outstanding Balance: **400**

Preferred E Outstanding Balance: **652,487**

Fig. 3: Security type filter dropdown

Note

Common security types include:

- Common Stock
- Preferred Stock
- Restricted Stock
- Options and Warrants

II.5 Available Actions

Note

The current system displays stock holdings information in the main table view.

From the Stock Holdings section, you can:

- View all your stock holdings across different companies
- Filter holdings by company or security type
- Sort holdings by various criteria
- Review certificate numbers, share quantities, and registration details

II.6 Next Steps

Explore the following section to learn more about viewing your stock holdings.

View Holdings

This guide explains how to effectively view and navigate your stock holdings in the TOL Login System.

Overview

The View Holdings feature provides a comprehensive display of all your stock certificates and positions across your investment portfolio. You can filter, sort, and examine detailed information about each holding.

Navigating the Holdings Display

The holdings display presents your investments in an organized table format with multiple viewing options.

Step 1: Access the Holdings View

From the main Stock Holdings page, your complete portfolio is displayed in the central viewing area.

STOCK HOLDINGS									John Brown Account ID: 1016-526			
CERTIFICATES												
Sort List By:		View:										
Company:		Outstanding Shares							Download Book Entry Forms			
Certificate	Company	Security	Date Issued	Date Canceled	Restriction	Affiliate/Control	Stop	Shares				
GATE-BOOK-16	Demo Company Inc	Common	02/27/2013		No Restriction	No		250				
BOOK-764	Demo Company Inc	Common	06/24/2013		No Restriction	No		90,000				
C-12936	Demo Company Inc	Common	06/24/2013		No Restriction	No		10				
BOOK-761	Demo Company Inc	Common	06/24/2013		No Restriction	No		10				
BOOK-762	Demo Company Inc	Common	06/24/2013		No Restriction	No		20				
BOOK-763	Demo Company Inc	Common	06/24/2013		No Restriction	No		20				
BOOK-771	Demo Company Inc	Common	11/01/2013		Rule 144	No		9,006				
BOOK-1616	Demo Company Inc	Common	11/13/2014		Rule 144	No		27,018				
BOOK-794	Demo Company Inc	Common	11/13/2014		No Restriction	No		270,930				
C-12995	Demo Company Inc	Common	12/18/2014		No Restriction	No		50				
« First Previous 1 2 3 Next » Last												
Demo Company Inc (ID: 347)												
Common Outstanding Balance: 652,487												
Options Outstanding Balance: 400												
Preferred E Outstanding Balance: 652,487												

Fig. 1: Main holdings view displaying your complete portfolio

See Also

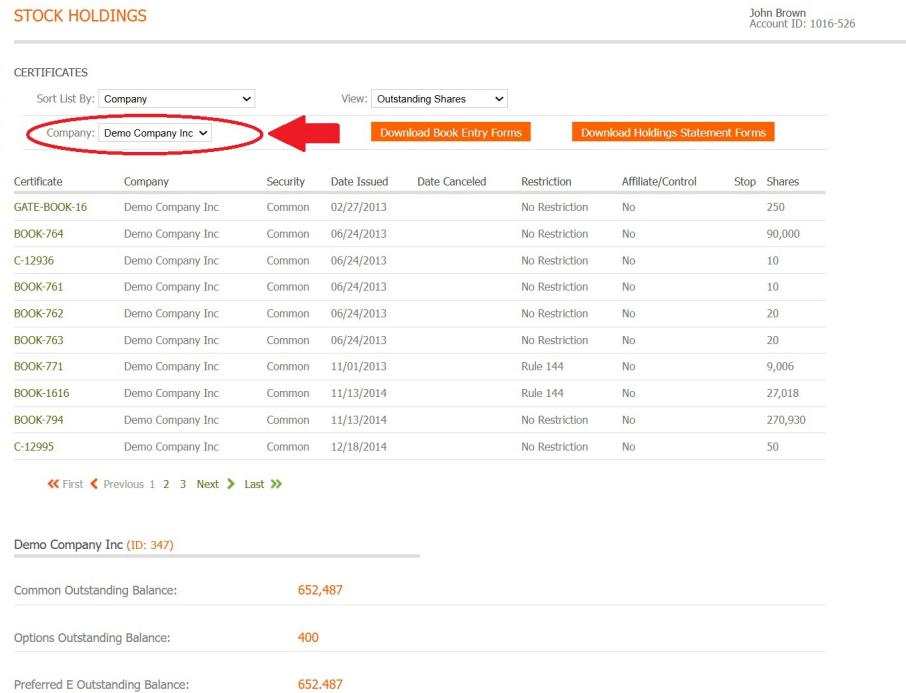
The default view shows all holdings across all companies. Use the filtering options to focus on specific investments.

Using Company Filters

Filter your holdings to view investments from specific companies in your portfolio.

Step 2: Select a Company

Click the company dropdown menu to see a list of all companies where you hold investments.



The screenshot shows the 'STOCK HOLDINGS' page. At the top right, it displays 'John Brown' and 'Account ID: 1016-526'. Below this, a 'CERTIFICATES' section has 'Sort List By: Company' and 'View: Outstanding Shares' dropdowns. A red circle highlights the 'Company:' dropdown menu, which is set to 'Demo Company Inc'. To the right of the dropdown is a red arrow pointing left towards the table. Below the dropdown is a table of certificate details. At the bottom of the table are navigation links: '<< First', '< Previous', '1 2 3 Next', 'Last', and '>>'. Below the table is a section for 'Demo Company Inc (ID: 347)' with outstanding balance details: 'Common Outstanding Balance: 652,487', 'Options Outstanding Balance: 400', and 'Preferred E Outstanding Balance: 652,487'.

Certificate	Company	Security	Date Issued	Date Canceled	Restriction	Affiliate/Control	Stop	Shares
GATE-BOOK-16	Demo Company Inc	Common	02/27/2013		No Restriction	No		250
BOOK-764	Demo Company Inc	Common	06/24/2013		No Restriction	No		90,000
C-12936	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-761	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-762	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-763	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-771	Demo Company Inc	Common	11/01/2013		Rule 144	No		9,006
BOOK-1616	Demo Company Inc	Common	11/13/2014		Rule 144	No		27,018
BOOK-794	Demo Company Inc	Common	11/13/2014		No Restriction	No		270,930
C-12995	Demo Company Inc	Common	12/18/2014		No Restriction	No		50

<< First < Previous 1 2 3 Next > Last >>

Demo Company Inc (ID: 347)

Common Outstanding Balance: 652,487

Options Outstanding Balance: 400

Preferred E Outstanding Balance: 652,487

Fig. 2: Company selection dropdown for filtering holdings

See Also

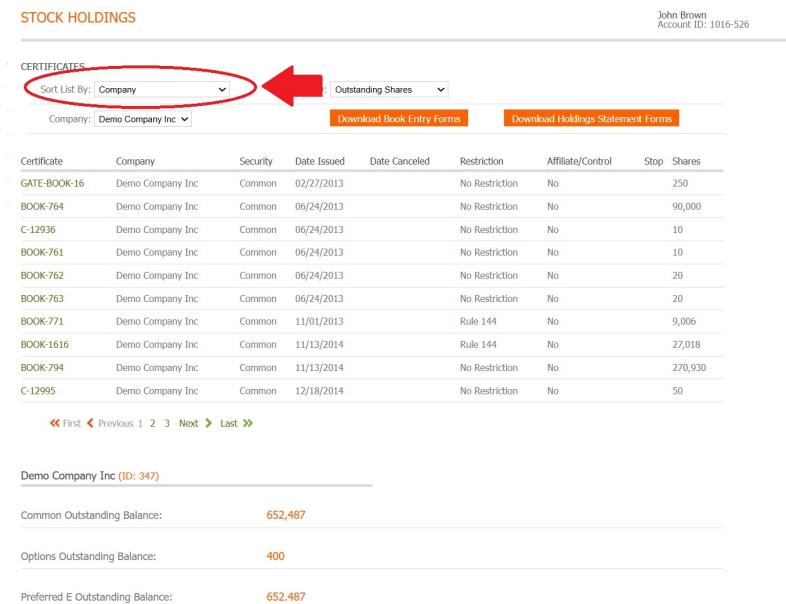
See Review Holdings Overview for more information.

Sorting Your Holdings

Organize your holdings display to find information quickly.

Step 3: Access Sort Options

Click the “Sort list by” dropdown to see available sorting criteria.



The screenshot shows the 'STOCK HOLDINGS' section of the Shareholder Portal. At the top right, it displays 'John Brown' and 'Account ID: 1016-526'. Below this, there are two dropdown menus: 'Sort List By:' (with 'Company' selected) and 'Outstanding Shares'. A red arrow points to the 'Sort List By:' dropdown. Below these are buttons for 'Download Book Entry Forms' and 'Download Holdings Statement Forms'. A dropdown menu for 'Company' is open, showing 'Demo Company Inc'. The main area displays a table of stock holdings:

Certificate	Company	Security	Date Issued	Date Canceled	Restriction	Affiliate/Control	Stop	Shares
GATE-BOOK-16	Demo Company Inc	Common	02/27/2013		No Restriction	No		250
BOOK-764	Demo Company Inc	Common	06/24/2013		No Restriction	No		90,000
C-12936	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-761	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-762	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-763	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-771	Demo Company Inc	Common	11/01/2013		Rule 144	No		9,006
BOOK-1616	Demo Company Inc	Common	11/13/2014		Rule 144	No		27,018
BOOK-794	Demo Company Inc	Common	11/13/2014		No Restriction	No		270,930
C-12995	Demo Company Inc	Common	12/18/2014		No Restriction	No		50

Below the table are navigation links: '« First', 'Previous 1 2 3 Next', and '» Last'. The 'Demo Company Inc (ID: 347)' section shows outstanding balances: 'Common Outstanding Balance: 652,487', 'Options Outstanding Balance: 400', and 'Preferred E Outstanding Balance: 652,487'.

Fig. 3: Sort options for organizing your holdings display

Available Sort Options

You can organize your holdings display using the following criteria:

- Company
- Issue Date, Earliest First
- Issue Date, Most Recent First
- Restriction
- Security
- Shares, Less First
- Shares, Most Shares First

Filtering by Security Type

Further refine your view by displaying only specific types of securities.

Step 4: Select Security Type Filter

Use the security types dropdown to filter holdings by security classification.

STOCK HOLDINGS
John Brown
Account ID: 1016-526

CERTIFICATES

Sort List By:

Company:

View:

Certificate	Company	Security	Date Issued	Date Canceled	Restriction	Affiliate/Control	Stop	Shares
GATE-BOOK-16	Demo Company Inc	Common	02/27/2013		No Restriction	No		250
BOOK-764	Demo Company Inc	Common	06/24/2013		No Restriction	No		90,000
C-12936	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-761	Demo Company Inc	Common	06/24/2013		No Restriction	No		10
BOOK-762	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-763	Demo Company Inc	Common	06/24/2013		No Restriction	No		20
BOOK-771	Demo Company Inc	Common	11/01/2013		Rule 144	No		9,006
BOOK-1616	Demo Company Inc	Common	11/13/2014		Rule 144	No		27,018
BOOK-794	Demo Company Inc	Common	11/13/2014		No Restriction	No		270,930
C-12995	Demo Company Inc	Common	12/18/2014		No Restriction	No		50

« First < Previous 1 2 3 Next > Last »

Demo Company Inc (ID: 347)

Common Outstanding Balance:	652,487
Options Outstanding Balance:	400
Preferred E Outstanding Balance:	652,487

Fig. 4: Security type filter options

See Also

Filtering by security type is particularly useful when you need to:

- Review only common stock positions
- Identify restricted securities
- Locate option grants or warrants
- Separate voting from non-voting shares

15 | Stock Holdings

III Dividends

This section guides you through accessing and managing your dividend information in the TOL Login System.

III.1 Overview

The Dividends section provides access to your dividend history and payments, including:

- View dividend payment history across all holdings
- Dividend date and outstanding shares on dividend date
- Date distributed and distributed shares information
- Filtering capabilities by All, Stock, or Cash

III.2 Accessing Dividends

To access your dividend information, navigate to the Dividends section from the main navigation menu.

Step 1: Locate Dividends in Navigation

Find and click the Dividends option in the left navigation menu.

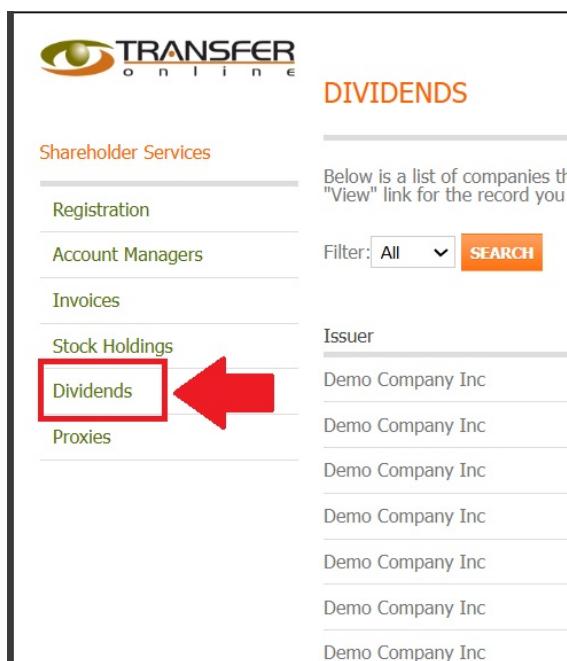


Fig. 1: Dividends location in the navigation menu

Action Complete

You have successfully navigated to the Dividends section.

III.3 Dividends Dashboard

The main Dividends page displays a comprehensive overview of all your dividend payments.

Step 2: Review Dividends Overview

Upon entering the Dividends section, you'll see your complete dividend payment history.

DIVIDENDS
John Brown
Account ID: 1016-526

Below is a list of companies that have paid out dividends to this account. The results may be filtered for Cash, Stock, or both types of dividends. Further details may be seen by clicking the "View" link for the record you wish to know more about.

Filter:

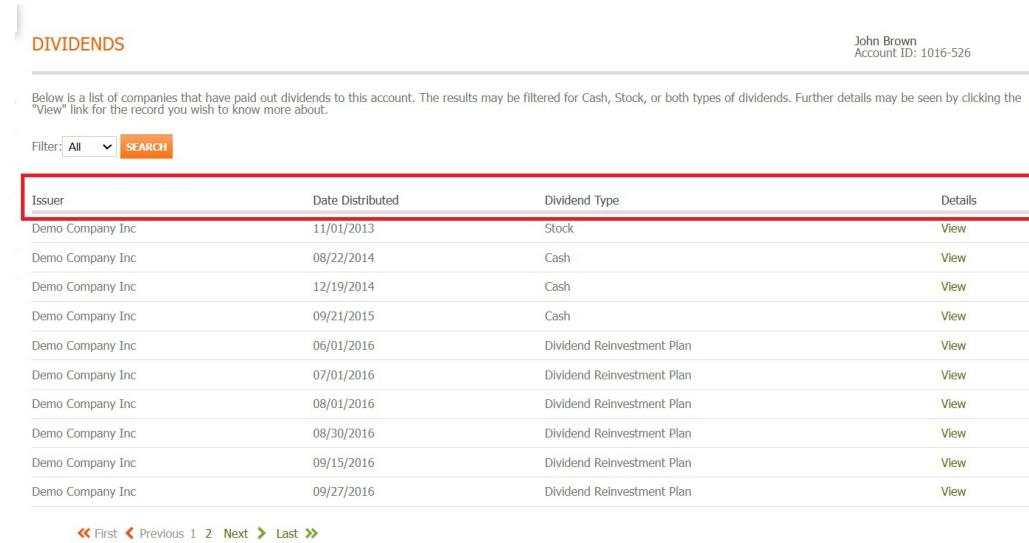
Issuer	Date Distributed	Dividend Type	Details
Demo Company Inc	11/01/2013	Stock	View
Demo Company Inc	08/22/2014	Cash	View
Demo Company Inc	12/19/2014	Cash	View
Demo Company Inc	09/21/2015	Cash	View
Demo Company Inc	06/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	07/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	08/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	08/30/2016	Dividend Reinvestment Plan	View
Demo Company Inc	09/15/2016	Dividend Reinvestment Plan	View
Demo Company Inc	09/27/2016	Dividend Reinvestment Plan	View

[« First](#) [Previous](#) [1](#) [2](#) [Next](#) [Last](#) [»](#)

Fig. 1: Dividends main dashboard

Step 3: Understanding the Dividends Table

The dividend information is organized in a detailed table format with multiple columns of essential data.



DIVIDENDS

John Brown
Account ID: 1016-526

Below is a list of companies that have paid out dividends to this account. The results may be filtered for Cash, Stock, or both types of dividends. Further details may be seen by clicking the "View" link for the record you wish to know more about.

Filter: All

« First < Previous 1 2 Next > Last »

Issuer	Date Distributed	Dividend Type	Details
Demo Company Inc	11/01/2013	Stock	View
Demo Company Inc	08/22/2014	Cash	View
Demo Company Inc	12/19/2014	Cash	View
Demo Company Inc	09/21/2015	Cash	View
Demo Company Inc	06/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	07/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	08/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	08/30/2016	Dividend Reinvestment Plan	View
Demo Company Inc	09/15/2016	Dividend Reinvestment Plan	View
Demo Company Inc	09/27/2016	Dividend Reinvestment Plan	View

Fig. 2: Dividends table column structure

Table Columns

The dividends table includes the following key information:

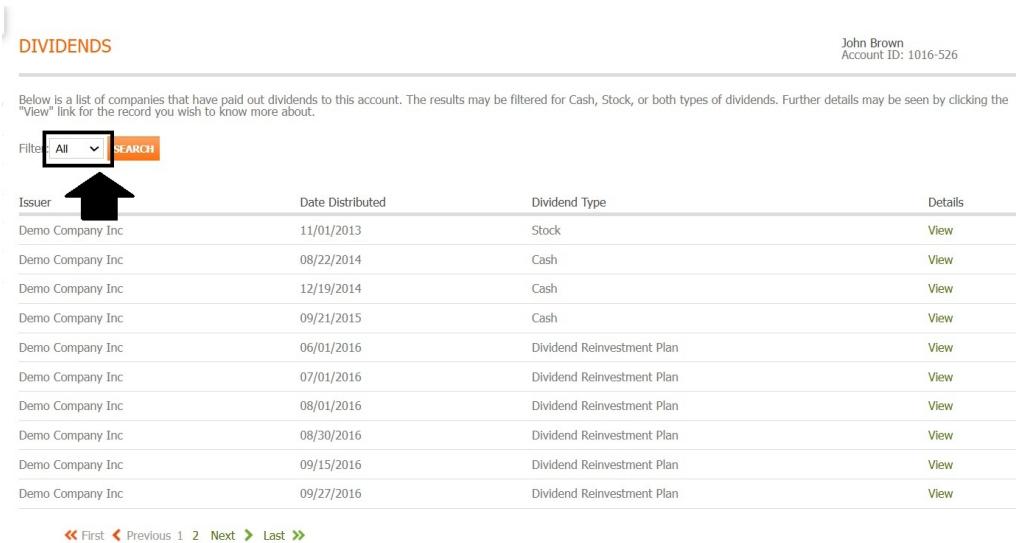
- **Issuer** - The company that issued the dividend
- **Date Distributed** - When the dividend was paid
- **Dividend Type** - Type of dividend payment
- **Details** - Additional dividend information

III.4 Filtering and Search Options

The Dividends section provides powerful filtering tools to help you locate specific dividend payments.

Step 4: Access Filter Options

Click on the filter dropdown to view available filtering options.



The screenshot shows the 'DIVIDENDS' section of the Shareholder Portal. At the top right, it displays 'John Brown' and 'Account ID: 1016-526'. Below this, a message states: 'Below is a list of companies that have paid out dividends to this account. The results may be filtered for Cash, Stock, or both types of dividends. Further details may be seen by clicking the "View" link for the record you wish to know more about.' A black arrow points to the 'Filter' dropdown menu, which is currently set to 'All'. To the right of the dropdown is a 'SEARCH' button. The main area is a table with columns: 'Issuer', 'Date Distributed', 'Dividend Type', and 'Details'. The table lists ten entries, all from 'Demo Company Inc', with dates ranging from 01/01/2013 to 09/27/2016. Each entry has a 'View' link in the 'Details' column. At the bottom of the table, there are navigation links: '« First', 'Previous 1 2 Next', and '» Last'.

Issuer	Date Distributed	Dividend Type	Details
Demo Company Inc	11/01/2013	Stock	View
Demo Company Inc	08/22/2014	Cash	View
Demo Company Inc	12/19/2014	Cash	View
Demo Company Inc	09/21/2015	Cash	View
Demo Company Inc	06/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	07/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	08/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	08/30/2016	Dividend Reinvestment Plan	View
Demo Company Inc	09/15/2016	Dividend Reinvestment Plan	View
Demo Company Inc	09/27/2016	Dividend Reinvestment Plan	View

Fig. 1: Filter dropdown location

Step 5: Select Filter Criteria

Choose from various filter options to refine your dividend display.

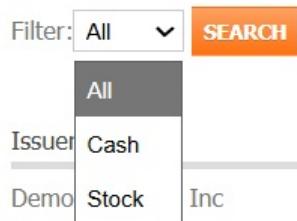


Fig. 2: Expanded filter options

Available Filter Options

You can refine your dividend display using the following filters:

- **All**
- **Stock**
- **Cash**

Step 6: Apply Filters

After selecting your filter criteria, click the **SEARCH** button to apply the filters.

DIVIDENDS

John Brown
Account ID: 1016-526

Below is a list of companies that have paid out dividends to this account. The results may be filtered for Cash, Stock, or both types of dividends. Further details may be seen by clicking the "View" link for the record you wish to know more about.

Filter: All **SEARCH**

Issuer	Date Distributed	Dividend Type	Details
Demo Company Inc	11/01/2013	Stock	View
Demo Company Inc	08/22/2014	Cash	View
Demo Company Inc	12/19/2014	Cash	View
Demo Company Inc	09/21/2015	Cash	View
Demo Company Inc	06/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	07/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	08/01/2016	Dividend Reinvestment Plan	View
Demo Company Inc	08/30/2016	Dividend Reinvestment Plan	View
Demo Company Inc	09/15/2016	Dividend Reinvestment Plan	View
Demo Company Inc	09/27/2016	Dividend Reinvestment Plan	View

[« First](#) [Previous](#) [1](#) [2](#) [Next](#) [» Last](#)

Fig. 3: Update button location

III.5 Viewing Dividend Information

Each dividend entry in the table includes a “View” button that allows you to access detailed information about that specific dividend payment.

Accessing Dividend Details

To view detailed information about a specific dividend:

1. Locate the dividend entry you want to examine
2. Click the “View” button in the row for that dividend



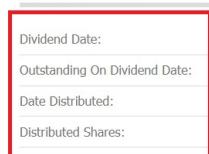
Issuer	Date Distributed	Dividend Type	Details
Demo Company Inc	11/01/2013	Stock	View
Demo Company Inc	08/22/2014	Cash	View
Demo Company Inc	12/19/2014	Cash	View
Demo Company Inc	09/21/2015	Cash	View

Fig. 1: View button location for dividend details

Dividend Details Page

The dividend details page provides specific information about the selected dividend payment, including:

- Dividend Date
- Outstanding on Dividend Date
- Date Distributed
- Distributed Shares



DIVIDEND DETAILS		John Brown Account ID: 1016-526
Dividends >> Details		
Dividend Date:	11/01/2013	
Outstanding On Dividend Date:	180,120	
Date Distributed:	11/01/2013	
Distributed Shares:	18,012.00	

Fig. 2: Dividend details page with categories highlighted

III.6 Available Actions

From the Dividends section, you can:

- View your complete dividend payment history
- Filter dividends by All, Stock, or Cash
- Access detailed information for individual dividend payments using the View button
- Review dividend dates and share distribution details

IV Invoices

This section guides you through accessing and managing your invoices and payment history in the TOL Login System.

IV.1 Overview

The Invoices section allows you to view and manage your billing information, displaying all invoices in an organized table format for easy tracking of payments and outstanding balances.

Step 1: Locate Invoices in Navigation

Find and click the Invoices option in the left navigation menu.



Fig. 1: Invoices location in the navigation menu

Action Complete

You have successfully navigated to the Invoices section.

IV.2 Invoices Dashboard

The main Invoices page displays a comprehensive list of all your invoices and their current status.

Step 2: Understanding the Invoices Table

The invoice information is organized in a detailed table format with essential billing information.

Fig. 1: Invoices table column structure

Table Columns

The invoices table includes the following key information:

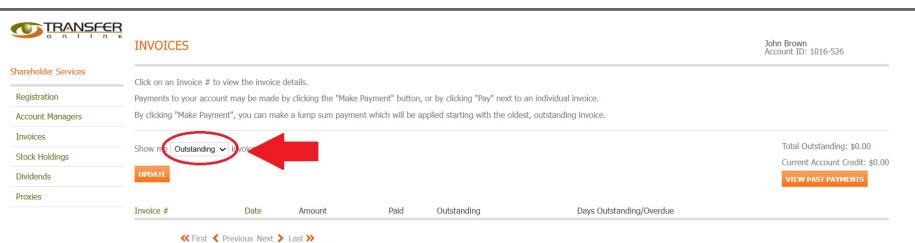
- **Invoice #** - Unique identifier for each invoice
- **Date** - Invoice date
- **Amount** - Total invoice amount
- **Paid** - Amount already paid
- **Outstanding** - Remaining balance to pay
- **Days Outstanding/Overdue** - Number of days the invoice has been outstanding or overdue

IV.3 Filtering Invoice Display

The Invoices section provides filtering options to help you locate specific invoices quickly.

Step 3: Access Filter Options

Click on the filter dropdown to view available filtering options.



The screenshot shows the Shareholder Portal's Invoices section. At the top, there's a navigation bar with 'TRANSFER online' and 'INVOICES'. On the right, it shows 'John Brown' and 'Account ID: 1016-526'. Below the navigation, there's a sidebar with 'Shareholder Services' and links to 'Registration', 'Account Managers', 'Invoices' (which is the active tab), 'Stock Holdings', 'Dividends', and 'Proxies'. The main content area has a heading 'Click on an Invoice #' to view the invoice details. It also includes instructions for making payments and a note about lump sum payments. A red arrow points to a dropdown menu labeled 'Outstanding' with a dropdown arrow. The dropdown menu is expanded, showing four options: 'Outstanding', 'Paid', 'Overdue', and 'All'. At the bottom of the page, there are buttons for 'First', 'Previous', 'Next', and 'Last'.

Fig. 1: Filter dropdown location

Step 4: Select Filter Criteria

Choose from various filter options to refine your invoice display.



Fig. 2: Expanded filter options

Available Filter Options

You can refine your invoice display using the following filter options:

- Outstanding
- Paid
- Overdue
- All

Step 5: Apply Filters

After selecting your filter criteria, click the UPDATE button to apply the filters.

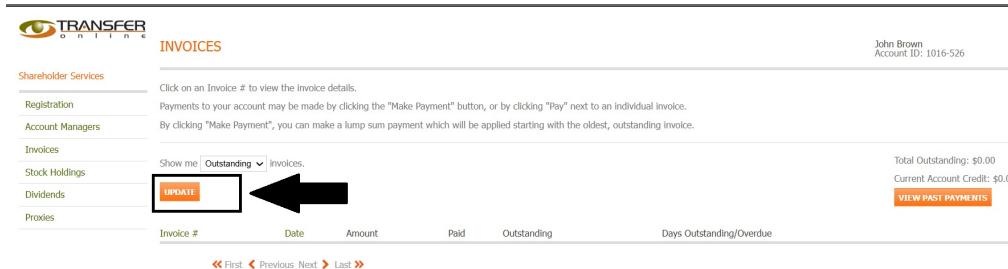


Fig. 3: UPDATE button location

Note

The UPDATE button refreshes the invoice list based on your selected filters. You can modify filters and update again as needed.

IV.4 Payment Information

Note

The current system displays all invoices in one view. Use the filter dropdown to switch between **Outstanding**, **Paid**, **Overdue**, or **All** invoices. A separate payment history page is not available in the current production system.

IV.5 Viewing Invoice Information

The current system displays invoice information in the table view only.

IV.6 Available Actions

From the Invoices section, you can:

- View the list of all invoices
- Filter to show Outstanding, Paid, Overdue, or All invoices
- See invoice numbers, dates, amounts, and payment status

V Proxies

This section guides you through viewing proxy information in the TOL Login System.

V.1 Overview

The Proxies section displays proxy information for shareholder meetings, including:

- Meeting dates and types
- Issuer information
- Record dates for voting eligibility

V.2 Accessing Proxies

To access proxy information, navigate to the Proxies section from the main navigation menu.

Step 1: Locate Proxies in Navigation

Find and click the Proxies option in the left navigation menu.

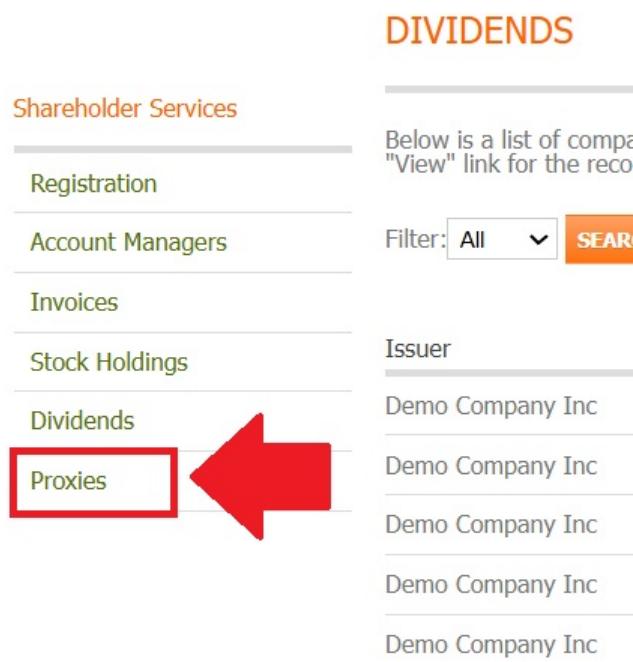


Fig. 1: Proxies location in the navigation menu

Action Complete

You have successfully navigated to the Proxies section.

V.3 Proxies Dashboard

The main Proxies page displays a list of proxy meetings.

Step 2: Review Proxies Overview

Upon entering the Proxies section, you'll see information about shareholder meetings.

PROXIES							John Brown Account ID: 1016-526
Title	Issuer	Meeting Date	Meeting Time	Record Date	Voting Shares	Vote	
DEMO Annual Meeting 2024	Demo Company Inc	12-25-2024	11:00 AM	11-15-2024	652487	Closed	
new	Demo Company Inc	03-30-2024	02:05 AM	03-14-2024	652487	Closed	
add new proxy	Demo Company Inc	07-15-2015	01:30 PM	07-13-2015	652487	Closed	
Puget Sound Bank 2015 Annual Meeting of Shareholders	Demo Company Inc	05-20-2015	03:00 PM	03-25-2015	256718	Closed	
Demo Company 2015 Annual Shareholder Meeting	Demo Company Inc	02-20-2015	06:00 PM	12-12-2014	252918	Closed	
Demo Test	Demo Company Inc	04-20-2023	04:05 AM	07-23-2014	198632	Closed	
Test 2013	Demo Company Inc	05-24-2014	02:05 AM	05-12-2014	198632	Closed	
Selection Test	Demo Company Inc	06-07-2014	01:05 AM	01-27-2014	198632	Closed	
proxy demo	Demo Company Inc	12-30-2013	02:05 AM	12-06-2013	198632	Closed	
HPEV Annual Meeting of Shareholders 2014	Demo Company Inc	01-13-2014	12:00 PM	11-15-2013	198632	Closed	

« First < Previous 1 2 Next > Last »

Fig. 1: Proxies main dashboard

Note

The dashboard displays proxy meeting information across your portfolio. Each entry shows key information including issuer, meeting dates, and meeting types.

Step 3: Understanding the Proxies Table

The proxy information is organized in a table format with multiple columns providing meeting information.

PROXIES							John Brown	Account ID: 1016-526
Title	Issuer	Meeting Date	Meeting Time	Record Date	Voting Shares	Vote		
DEMO Annual Meeting 2024	Demo Company Inc	12-25-2024	11:00 AM	11-15-2024	652487	Closed		
new	Demo Company Inc	03-30-2024	02:05 AM	03-14-2024	652487	Closed		
add new proxy	Demo Company Inc	07-15-2015	01:30 PM	07-13-2015	652487	Closed		
Puget Sound Bank 2015 Annual Meeting of Shareholders	Demo Company Inc	05-20-2015	03:00 PM	03-25-2015	256718	Closed		
Demo Company 2015 Annual Shareholder Meeting	Demo Company Inc	02-20-2015	06:00 PM	12-12-2014	252918	Closed		
Demo Test	Demo Company Inc	04-20-2023	04:05 AM	07-23-2014	198632	Closed		
Test 2013	Demo Company Inc	05-24-2014	02:05 AM	05-12-2014	198632	Closed		
Selection Test	Demo Company Inc	06-07-2014	01:05 AM	01-27-2014	198632	Closed		
proxy demo	Demo Company Inc	12-30-2013	02:05 AM	12-06-2013	198632	Closed		
HPEV Annual Meeting of Shareholders 2014	Demo Company Inc	01-13-2014	12:00 PM	11-15-2013	198632	Closed		

« First < Previous 1 2 Next > Last »

Fig. 2: Proxies table column structure

Table Columns

The proxies table includes the following columns:

- **Title** - The title or description of the proxy meeting
- **Issuer** - The company holding the meeting
- **Meeting Date** - When the shareholder meeting will occur
- **Meeting Time** - The scheduled time of the meeting
- **Record Date** - Date for determining voting eligibility
- **Voting Shares** - Number of shares eligible to vote
- **Vote** - Your voting status or action

V.4 Proxy Information

Note

The current system displays proxy meeting information in a table format.

V.5 Available Information

From the Proxies section, you can:

- View upcoming and past shareholder meetings
- Review meeting dates and times
- Check record dates for voting eligibility
- See which companies are holding meetings

VI Account Managers

This section guides you through managing account access and permissions for additional users in the TOL Login System.

VI.1 Overview

The Account Managers feature allows primary account holders to:

- Grant access to trusted individuals
- Set specific permission levels for each manager
- Monitor account manager activities
- Revoke access when needed
- Maintain security while delegating account tasks
- Control what information managers can view or modify

VI.2 Accessing Account Managers

To manage account access permissions, navigate to the Account Managers section from the main navigation menu.

Step 1: Locate Account Managers in Navigation

Find and click the Account Managers option in the left navigation menu.

TRANSFER online

Shareholder Services

Registration

Account Managers

Stock Holdings

Dividends

Proxies

ACCOUNT MANAGERS

Overview of all the managers for this account.

Click the name of a manager to edit their permissions for this service. If any links are pending manager review, simply click the appropriate button to accept or deny the request.

	Status	Last Status Update On
Web User Account Holder web-user-account-holder@transferonline.com	Successful / Manager Initiated	07-26-2024

ADD A NEW MANAGER

Fig. 1: Account Managers location in the navigation menu

Action Complete

You have successfully navigated to the Account Managers section.

VI.3 Account Managers Dashboard

The main Account Managers page displays all users who have been granted access to your account.

Step 2: Review Current Account Managers

Upon entering the Account Managers section, you'll see a list of all active account managers and their permission levels.

Manager	Status	Last Status Update On
Web User Account Holder web-user-account-holder@transferonline.com	Successful / Manager Initiated	07-26-2024

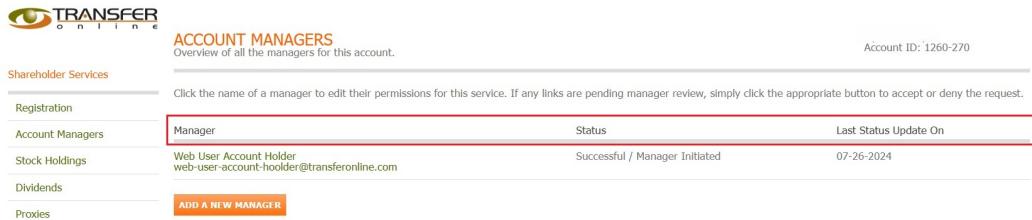
Fig. 1: Account Managers main dashboard

Dashboard Information

The dashboard displays all users with delegated access to your account. Each entry shows the manager's information, current status, and when their status was last updated.

Step 3: Understanding the Account Managers Table

The account manager information is organized in a comprehensive table format.



Manager	Status	Last Status Update On
Web User Account Holder web-user-account-holder@transferonline.com	Successful / Manager Initiated	07-26-2024

Fig. 2: Account Managers table column structure

Table Columns

The account managers table includes the following key information:

- **Manager** - Name and email of the authorized user
- **Status** - Current access status (Active, Pending, or Inactive)
- **Last Status Update On** - When the manager's status was last changed

VI.4 Adding New Account Managers

You can grant access to new users who need to help manage your shareholder account.

Step 4: Initiate New Manager Addition

Click the “Add New Manager” button to begin the process of granting account access.



Fig. 1: Add New Manager button location

Before You Begin

Before adding a new account manager:

- Verify the person's identity and trustworthiness
- Determine the appropriate permission level
- Have their correct email address ready
- Consider the security implications of shared access

New Manager Setup Process

When adding a new account manager, you'll need to:

Enter Manager Information

- Full legal name
- Valid email address
- Phone number (optional)
- Relationship to account holder

VI.5 Managing Existing Account Managers

For each account manager in your list, you can perform various management actions.

Step 5: Select a Manager to Manage

Click on an account manager's email address to access their detailed settings.

Manager	Status	Last Status Update On
Web User Account Holder web-user-account-holder@transferonline.com	Successful / Manager Initiated	07-26-2024

Fig. 1: Selecting a manager by email address

Manager Details

Clicking the email address opens the detailed manager settings page where you can modify permissions, view activity logs, and manage access levels.

VI.6 Available Actions

From the Account Managers section, you can:

- [View and modify manager permissions](#) (page 34)
- Add new account managers

VI.7 Security Best Practices

When using account managers:

- Only grant access to trusted individuals
- Use the minimum permission level necessary
- Regularly review and update access lists
- Remove access immediately when no longer needed
- Keep primary account credentials private

VI.8 Next Steps

Explore the following section to learn more about managing individual account manager settings:

Manager Details

This section provides detailed instructions for managing individual account manager permissions and settings.

Overview

The Manager Details page allows you to:

- Review detailed information about a specific account manager
- Modify permission levels and access rights
- Set or change access expiration dates
- Remove account manager access

Accessing Manager Details

After selecting an account manager from the main Account Managers page, you'll be directed to their individual details page.

Understanding the Details Layout

The Manager Details page displays a table with three columns showing basic manager information:

MANAGER DETAILS			Account ID: 1260-270
Manager	Status	Last Status Update On	
Web User webuser@gmail.com	Successful / Manager Initiated	07-26-2024	
MODIFY THE MANAGER PERMISSIONS			
You may assign members certain rights while accessing this account. These rights are based on links in the menu to the left. Place a check next to the feature that you would like the user to have access to. Uncheck those you do not want the user to have access to. Select the "Update Manager Permissions" button when you are ready.			
<input checked="" type="checkbox"/> Receive Account Email	<input checked="" type="checkbox"/> Shareholder Profile		
<input checked="" type="checkbox"/> View Stock Holdings	<input checked="" type="checkbox"/> Grant/Revoke Management Privileges		
<input checked="" type="checkbox"/> View/Pay Invoices	<input checked="" type="checkbox"/> Run Reports		
<input checked="" type="checkbox"/> Proxy Voting	<input type="checkbox"/> Receive Messages		
<input checked="" type="checkbox"/> View Dividends	<input checked="" type="checkbox"/> View Bond Holdings		
<input checked="" type="checkbox"/> View Stock Options			
UPDATE			
REMOVE THIS MANAGER			
You may remove this member's ability to manage this account by selecting the "remove manager" button. This will notify the user and remove them from managing this account.			
REMOVE			

Fig. 1: Manager Details table columns

Note

The table displays:

- **Manager** - The name of the account manager
- **Status** - The current status of the manager's access
- **Last Status Update On** - The date when the manager's status was last changed

Managing Permissions

The permissions section allows you to control exactly what actions an account manager can perform.

Step 1: Review Current Permissions

Examine the permission checkboxes to understand the manager's current access level.

MANAGER DETAILS

Manager	Status	Last Status Update On
Web User webuser@gmail.com	Successful / Manager Initiated	07-26-2024

Account ID: 1260-270

MODIFY THE MANAGER PERMISSIONS

You may assign members certain rights while accessing this account. These rights are based on links in the menu to the left. Place a check next to the feature that you would like the user to have access to. Uncheck those you do not want the user to have access to. Select the "Update Manager Permissions" button when you are ready.

<input checked="" type="checkbox"/> Receive Account Email <input checked="" type="checkbox"/> View Stock Holdings <input checked="" type="checkbox"/> View/Pay Invoices <input checked="" type="checkbox"/> Proxy Voting <input checked="" type="checkbox"/> View Dividends <input checked="" type="checkbox"/> View Stock Options	<input checked="" type="checkbox"/> Shareholder Profile <input checked="" type="checkbox"/> Grant/Revoke Management Privileges <input checked="" type="checkbox"/> Run Reports <input type="checkbox"/> Receive Messages <input checked="" type="checkbox"/> View Bond Holdings
---	---

UPDATE

REMOVE THIS MANAGER

You may remove this member's ability to manage this account by selecting the "remove manager" button. This will notify the user and remove them from managing this account.

REMOVE

Fig. 2: Permission settings with checkbox locations

See Also

Permission categories include:

- **Receive Account Email** - Receive email notifications for account activities
- **View Stock Holdings** - See stock certificates and positions
- **View/Pay Invoices** - Access and pay account invoices
- **Proxy Voting** - Submit proxy votes on your behalf
- **View Dividends** - Access dividend information and history
- **View Stock Options** - View stock option grants and exercises
- **Shareholder Profile** - Access and modify shareholder profile information
- **Grant/Revoke Management Privileges** - Manage other account managers
- **Run Reports** - Generate and download account reports
- **Receive Messages** - Receive account-related messages and notifications
- **View Bond Holdings** - See bond certificates and positions

Step 2: Modify Permissions

To change permissions:

1. Check or uncheck the appropriate permission boxes
2. Review the changes carefully
3. Consider the security implications
4. Proceed to save the updates

Warning

Permission changes take effect immediately. Ensure you understand the implications of each permission before granting or revoking access.

Step 3: Save Permission Changes

After adjusting permissions, click the Update button to save your changes.

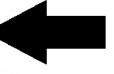
MANAGER DETAILS

Account ID: 1260-270		
Manager	Status	Last Status Update On
Web User webuser@gmail.com	Successful / Manager Initiated	07-26-2024

MODIFY THE MANAGER PERMISSIONS

You may assign members certain rights while accessing this account. These rights are based on links in the menu to the left. Place a check next to the feature that you would like the user to have access to. Uncheck those you do not want the user to have access to. Select the "Update Manager Permissions" button when you are ready.

<input checked="" type="checkbox"/> Receive Account Email <input checked="" type="checkbox"/> View Stock Holdings <input checked="" type="checkbox"/> View/Pay Invoices <input checked="" type="checkbox"/> Proxy Voting <input checked="" type="checkbox"/> View Dividends <input checked="" type="checkbox"/> View Stock Options	<input checked="" type="checkbox"/> Shareholder Profile <input checked="" type="checkbox"/> Grant/Revoke Management Privileges <input checked="" type="checkbox"/> Run Reports <input type="checkbox"/> Receive Messages <input checked="" type="checkbox"/> View Bond Holdings
---	---

UPDATE 

REMOVE THIS MANAGER
You may remove this member's ability to manage this account by selecting the "remove manager" button. This will notify the user and remove them from managing this account.

REMOVE

Fig. 3: Update button location for saving permission changes

37 | Account Managers

Contacting Account Managers

You can initiate email communication directly from the Manager Details page.

Step 4: Send Email to Manager

Click on the manager's email address or name to begin composing an email.

MANAGER DETAILS

Account ID: 1260-270

Manager	Status	Last Status Update On
Web User webuser@gmail.com	Successful / Manager Initiated	07-26-2024

MODIFY THE MANAGER PERMISSIONS

You may assign members certain rights while accessing this account. These rights are based on links in the menu to the left. Place a check next to the feature that you would like the user to have access to. Uncheck those you do not want the user to have access to. Select the "Update Manager Permissions" button when you are ready.

<input checked="" type="checkbox"/> Receive Account Email	<input checked="" type="checkbox"/> Shareholder Profile
<input checked="" type="checkbox"/> View Stock Holdings	<input checked="" type="checkbox"/> Grant/Revoke Management Privileges
<input checked="" type="checkbox"/> View/Pay Invoices	<input checked="" type="checkbox"/> Run Reports
<input checked="" type="checkbox"/> Proxy Voting	<input type="checkbox"/> Receive Messages
<input checked="" type="checkbox"/> View Dividends	<input checked="" type="checkbox"/> View Bond Holdings
<input checked="" type="checkbox"/> View Stock Options	

UPDATE

REMOVE THIS MANAGER
You may remove this member's ability to manage this account by selecting the "remove manager" button. This will notify the user and remove them from managing this account.

REMOVE

Fig. 4: Click email or name to contact the account manager

Note

Clicking the email link will:

- Open your default email client
- Pre-populate the recipient address
- Allow you to compose a message

Removing Account Managers

When an account manager no longer requires access, you can remove them from your account.

Step 5: Remove Manager Access

Locate and click the Remove button to revoke all access for this manager.

MANAGER DETAILS

Manager	Status	Last Status Update On
Web User webuser@gmail.com	Successful / Manager Initiated	07-26-2024

MODIFY THE MANAGER PERMISSIONS

You may assign members certain rights while accessing this account. These rights are based on links in the menu to the left. Place a check next to the user to have access to. Uncheck those you do not want the user to have access to. Select the "Update Manager Permissions" button when you are finished.

<input checked="" type="checkbox"/> Receive Account Email	<input checked="" type="checkbox"/> Shareholder Profile
<input checked="" type="checkbox"/> View Stock Holdings	<input checked="" type="checkbox"/> Grant/Revoke Management Privileges
<input checked="" type="checkbox"/> View/Pay Invoices	<input checked="" type="checkbox"/> Run Reports
<input checked="" type="checkbox"/> Proxy Voting	<input type="checkbox"/> Receive Messages
<input checked="" type="checkbox"/> View Dividends	<input checked="" type="checkbox"/> View Bond Holdings
<input checked="" type="checkbox"/> View Stock Options	

UPDATE

REMOVE THIS MANAGER

You may remove this member's ability to manage this account by selecting the "remove manager" button. This will notify the user and remove the manager from the account.

REMOVE 

Fig. 5: Remove button location for revoking manager access

Warning

Before Removing a Manager:

- Verify they no longer need access
- Understand that removal is immediate and irreversible
- The manager will receive an email notification of removal

Important

Removed managers cannot access your account immediately upon removal. To restore access, you must add them as a new manager again.