

NEW SYSTEM SAME GREAT SERVICE

LAUNCHING JUNE 3, 2019



We would like to take this opportunity to let you know that we will be converting to a new system called TrustPortal. While we're excited about this new system and the improvements it will bring to the look of your statements, we'd like to share a few things with you to be prepared for the conversion.

What's Happening and When?

- June 1, 2019 : System conversion*
- May 1st - June 3rd : Account/asset transfer blackout
- May 24th - June 2nd : Trade blackout period
- June 3rd : First day to start trading in new system

What action do I need to take?

- Make any trades before May 24th as this is the last day to trade in current system. New system trades begin June 3rd.
- You may want to access your Weblink online account and download May statements as well as any prior statements. This access goes away as of July 1, 2019.

What actions will Horizon take?

- Going forward, statements from June-December 2019 will not include the YTD summary column which you see now on the summary page. This will reappear on your January 2020 and later statements.
- Beginning in June, we will be changing our fee cycle to calculate based on calendar month. For example, your June fee cycle will include activity from June 1st through June 30th. As opposed to your current fee cycle showing activity from the May 8th through June 7th.
- Information regarding the new online TrustReporter system will be posted on our website. This will include a new user guide.
- We will send online Weblink users a new temporary password for online account access to TrustReporter the week of May 20th.
- We will be available anytime to answer any of your questions.

HORIZON

TRUST & INVESTMENT
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**If you use our Weblink online account access, the system will not be available during this time. Online account access via TrustReporter will be available to you on Monday, June 3rd along with a link to the new platform.*