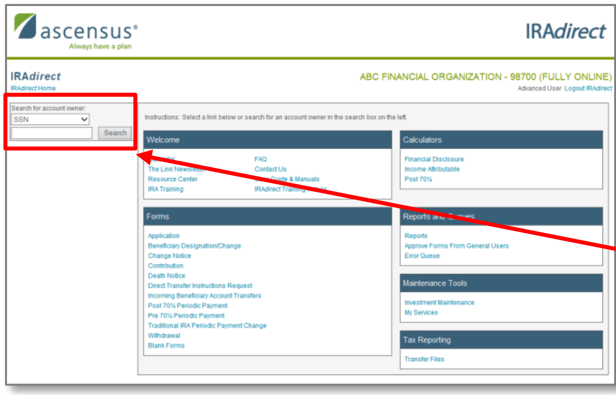
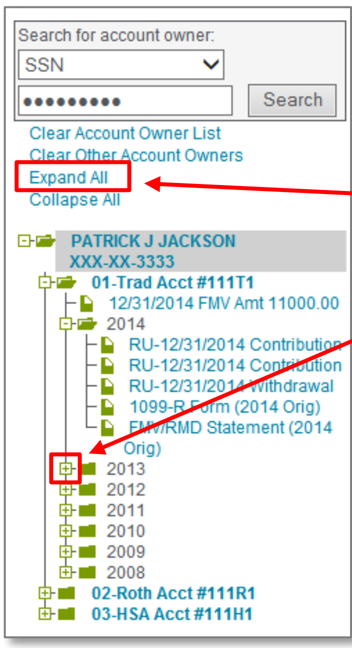
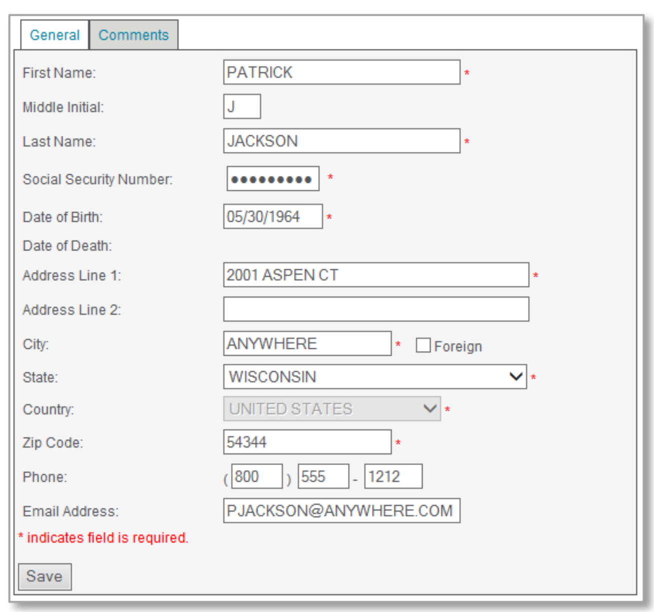


To display an account owner on the tree, navigate to the **Search for account owner** tool located in the upper left side of the IRA*direct* homepage. A user can search for the account owner by Social Security number, last name, full name, or account number. When the **Search** button is clicked, the account owner is displayed.

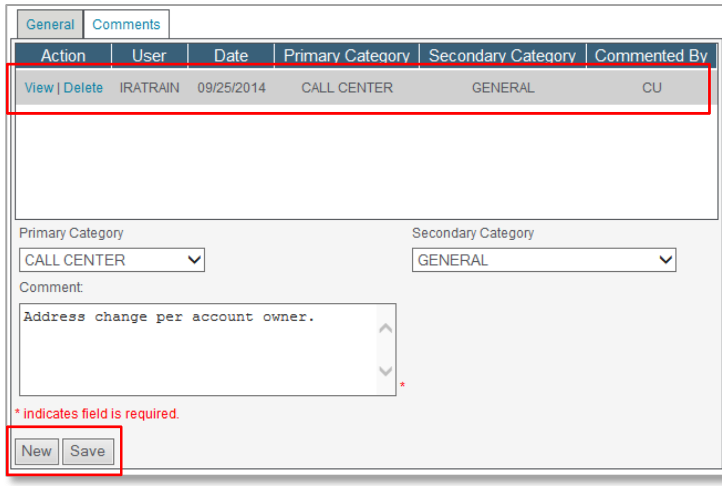


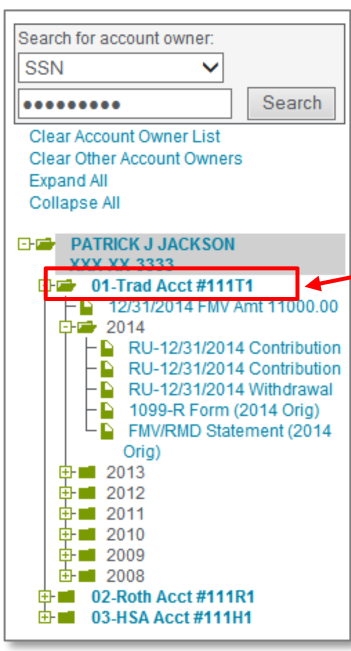
To view the account owner's activity for a certain year, click the plus sign next to that year's folder. To see all of the history for that account owner, simply click the **Expand All** link.

When an account owner is displayed in the tree and the owner's name is clicked, the **General** screen appears. The **General** screen contains the owner's personal identifying information. Advanced Users can update any of the account owner's personal information and save the changes.



The **Comments** tab allows the user to document information about account owners or any of their accounts. The information can be categorized by making the appropriate selection from the drop-down menu beneath the Primary Category and the Secondary Category. To add a comment, click the **New** button in the lower left corner of the screen, select the primary category and secondary category, enter the comment information in the Comment field, and then click **Save**. Users have the option to **View** their own comments, as well as **Delete** them.





The **Account** screen displays the information about the individual account as selected in the tree. It displays the open date, account number, account status, closed date (if applicable), and for a Traditional IRA, the IRA type. An Advanced User can make changes to these fields if necessary. This screen can also be used to add contributions and withdrawals, or to delete the account. To add a contribution or withdrawal, select the appropriate **Create Contribution** or **Create Withdrawal** radio button, and click **Continue.** On the next screen, complete the applicable fields, and click **Save**. For more information on how to add a contribution or withdrawal, please watch the **Adding a Contribution** or **Adding a Withdrawal** tutorials.