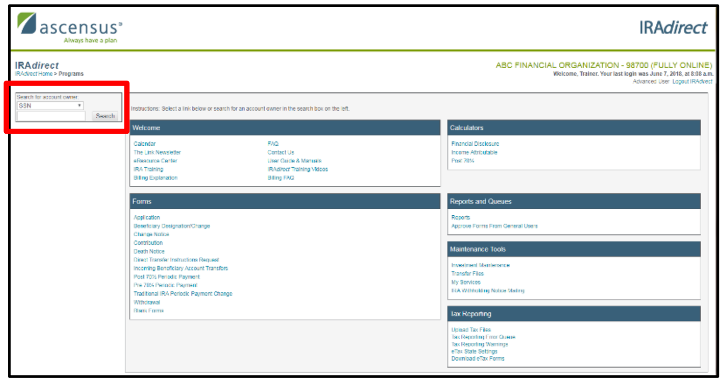
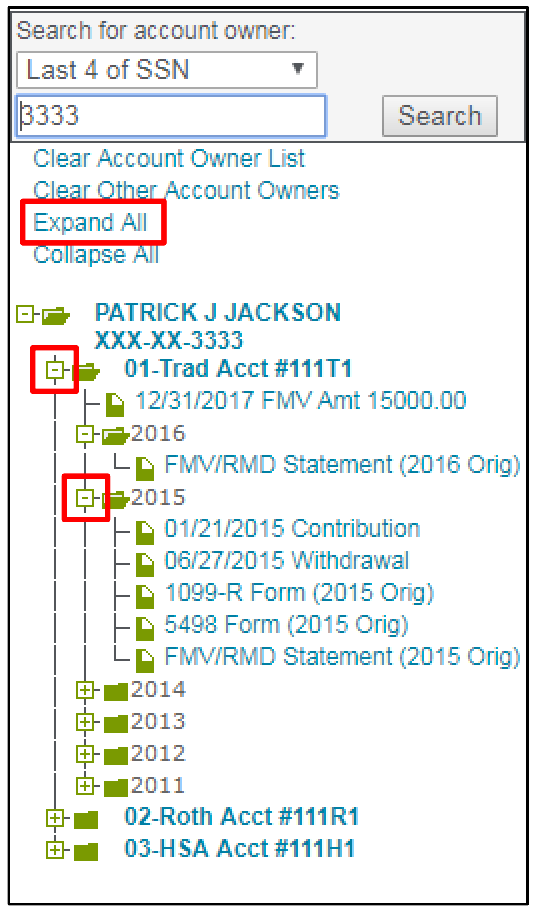
Account Owner Tree Navigation



To display an account owner on the tree, the user navigates to the **Search for Account Owner** tool located in the upper left side of the IRA*direct* homepage. The user can search for the account owner by Social Security number, last name, full name, or account number. After the user clicks **Search**, the account owner is displayed on the tree.

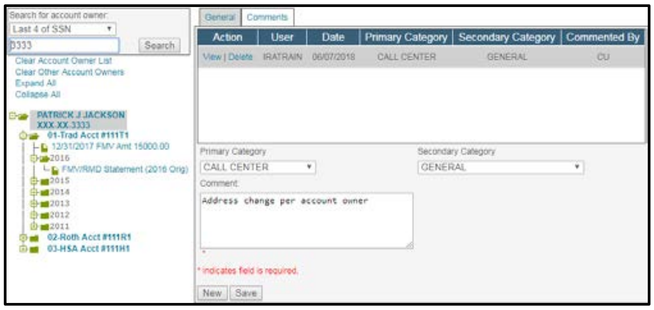
The account owner tree consists of account owner information in a “branch” type listing. The account owner is the “trunk” of the tree, the individual accounts are the “limbs” of the tree, and the account transactions are the “branches” of the tree.

Move to the **Expand All** link beneath the **Search** fields. Click this link to open the entire account owner tree to view. To collapse the information, click the minus icon. To view the account information, click the plus icon to the left of the account.

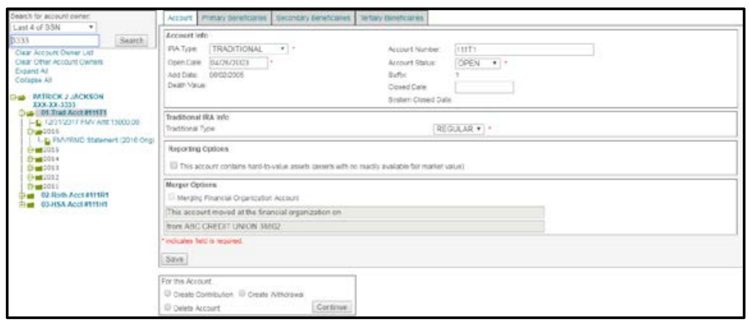


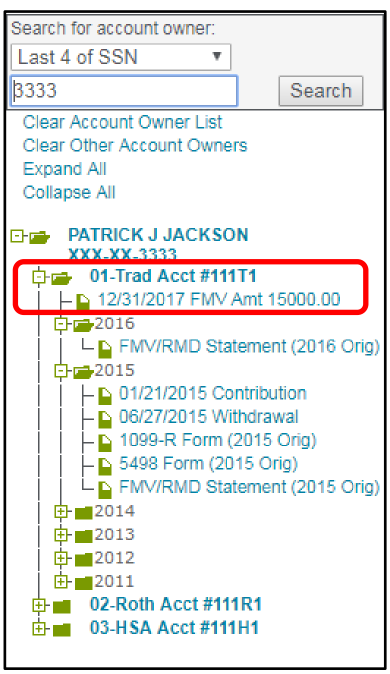
When the user clicks the account owner name in the account owner tree, the **General** screen appears. This screen displays the account owner's name, address, phone number, and email address.

The user can also click the **Comments** link which provides a way to enter comments regarding a transaction or conversation with the account owner. For more information on either of these functionalities, please view the **Account Owner Information and Account Information** tutorial.



The account screen displays the information about the individual account as selected in the tree. For more information about the functionality of this screen please view the **Account Owner Information and Account Information** tutorial.





Below the account level is the most recent fair market value (FMV), and if applicable, the account owner's scheduled payment election.

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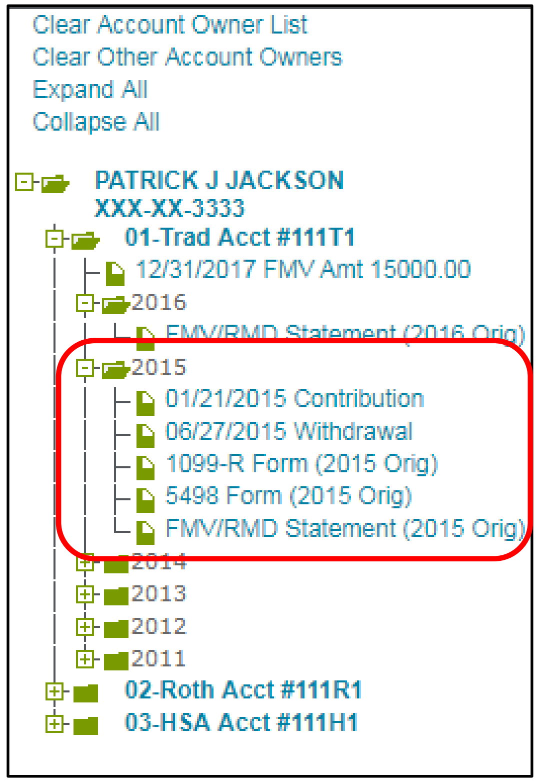
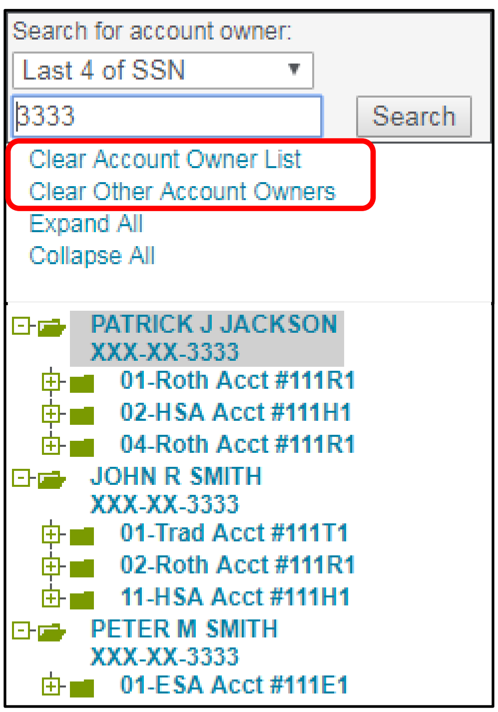


You can view the account owner's tax year's information starting chronologically with the most recent year.

This information includes rolled-up contributions and distributions, original and corrected tax forms, required minimum distribution (RMD), and fair market value (FMV) statements.



If there are multiple account owners displayed in the tree, you can return to just one account owner in the list by clicking the **Clear Other Account Owners** link.

To remove all account owners from the tree, click the **Clear Account Owner List** link.

For more information on the account owner tree, please view the **IRA*direct* User Guide.**