Overview

The Amalgamated Investment Management (AIM) client platform is an online account management system that gives you instant access to specific and complete account information via an intuitive interface. AIM helps you monitor work lists for transactions and holdings in real time, with the option of an added level of security through multi-factor authentication.*

The topics covered in this manual will help you get familiar with most of the components of AIM, so you can manage your accounts more efficiently by improving accuracy and workflow. In this manual, you will learn how to use the following sections:

Logging In ........................................................................................................................................3
Dashboard ........................................................................................................................................7
Account ...........................................................................................................................................9
Account Group ................................................................................................................................11
Reports ...........................................................................................................................................12
My Profile .......................................................................................................................................12
Logging Out ....................................................................................................................................12
Appendix: Configuration Requirements..........................................................................................13

If you need further assistance with AIM, please call 212-895-4935 during the business hours of 9:00 AM to 5:00 PM EST, or email AIMsupport@amalgamatedbank.com at any time and we will respond to your email within 24 hours.

*Please be advised that opting into multi-factor authentication via text message will require an additional login credential delivered to your personal mobile device. Your mobile carrier's message and data rates may apply.

The information in this manual is subject to change without notice. Further, your use of AIM is subject to the terms of use. This document is for registered AIM users only and not for public distribution.

Rev. 07/16
Logging In: How to access AIM

1. Go to amalgamatedbank.com.
2. Click the orange Login button in the top right corner and then select Amalgamated Investment Management from the drop-down menu. Click Continue.
3. On the login page, enter your username and password.
Logging In: Continued

Logging in for the first time

4. For your first login, enter your username and the temporary password provided to you by AIM Support.

5. You will be prompted to create a new password. Enter your temporary password in the Old Password field and your new custom password in the New Password and Repeat Password fields. Your new password must contain at least eight characters and at least one lowercase letter, one uppercase letter, and one numeral. It should not contain any part of your username.

Please note that your password will expire in 90 days, at which point you will be prompted to create a new password. Expired passwords may not be used again as new passwords.
Logging In: Continued

6. Configure your security settings by following the prompts.

7. Set up your secret question for an additional layer of security during login.
8. When logging in from a new device that is not recognized by the system, you will be asked to answer the secret security question that you set up during your first login.

9. Check the box for “Do not challenge me on this device again” to instruct the system to remember your device for future logins. If you login from a recognized device, you may not be prompted to answer your secret security question.
**Dashboard: How to navigate**

1. To open the Dashboard, log in to AIM.
2. You can minimize or expand any section of the Dashboard by clicking on the symbol in the upper right corner of the Accounts, Account Groups, or Charts sections.
3. Use the Modify View drop-down menu to select your preferred Sort By option, category, and number of items to display. Click Refresh to save your choices.
4. Select your preferred column options by clicking on the Select Action tab. Under Display Columns, use arrows to select the fields you would like to see. You can also add those preferences to your Favorites to make them readily available in the future.
**Account: How to view, print, and download your information**

The Account tab gives a snapshot of the Account Details, Account Profile, Holdings, Pending Activities, and Transactions.

**Account Profile**

1. The profile of the account you’re authorized to view.
2. Your real-time cash values.
3. Your portfolio's gains/losses.
4. Applicable relationships attached at the account level.
**Account: Continued**

### Holdings

5. Choose which columns to display, and expand or collapse the amount of data shown.

6. Click on the highlighted text in the Account Holdings Report, to see an expanded description of the security.

7. Use the Modify View drop-down menu to:
   - View your report by Trade or Settlement Date
   - Select column options and order through the Column Options tab

8. Preview or export the report by clicking on the corresponding link.

### Pending Activities

9. Use the Modify View drop-down menu to adjust the viewing options.

10. See an expanded description of the security by clicking on the highlighted text.
In the Transactions section, you can:

11. See transaction details by clicking on the highlighted text. Transactions posted are listed by type.

12. Use the Modify View drop-down menu to:
   • Group information by either Trade Date or Date Settled (recommended)
   • Specify Security Identifier or Description in the Advanced Options tab
   • Select your preferred displayed columns within the Column Options tab

Account Group: How to access your group quickly

The Account Group tab gives you fast access to any Account Groups you created in the My Profile section.

Creating account groups allows you to customize your viewing experience and organize information in a way that meets your needs.
1. Click on the Log Out link in the upper right corner of your screen.

2. After you're done with your session of AIM, we recommend quitting your browser in order to clear your activity.

---

**Reports: How to view**

1. Go to the Reports tab and click on Statement Summary for access to your monthly and end of fiscal year statements. All statements will be in PDF format.

**My Profile: How to set preferences and create Account Groups**

1. Go to the My Profile tab and click on the link of each area you'd like to set preferences for:
   - Exporting
   - Charts
   - Favorites

2. Use the My Profile tab to create a new group:
   - Click on the Account Group link
   - Select New
   - Follow the prompts to create your group name and choose the portfolios to be included in the group

---

**Logging Out**

1. Click on the Log Out link in the upper right corner of your screen.

2. After you're done with your session of AIM, we recommend quitting your browser in order to clear your activity.
Appendix: Configuration Requirements

AIM is compatible with the following software

<table>
<thead>
<tr>
<th>Software</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Windows</td>
<td>Versions 7, 8, and 10</td>
</tr>
<tr>
<td>Apple</td>
<td>OS X El Capitan</td>
</tr>
<tr>
<td>Browser</td>
<td>Internet Explorer versions 10 and 11 and the</td>
</tr>
<tr>
<td></td>
<td>latest versions of Chrome, Firefox, and Safari</td>
</tr>
<tr>
<td>Infinity Process Platform (IPP)</td>
<td>Version 7.1.1</td>
</tr>
</tbody>
</table>

Recommended PC requirements for AIM users

<table>
<thead>
<tr>
<th>Hardware/Software</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>Intel Core2 Duo E7200 or better with 100 Mbps network card</td>
</tr>
<tr>
<td>Memory</td>
<td>At least 2 GB available* memory</td>
</tr>
<tr>
<td>Operating System</td>
<td>Windows 7 with the latest Microsoft patches</td>
</tr>
<tr>
<td>Browser</td>
<td>Internet Explorer version 10 or 11</td>
</tr>
</tbody>
</table>

*“Available” refers to the memory or disk space available for use after standard suite of office applications are started (Outlook, Word, Antivirus, Firewall, etc.)