

## DST Vision New User Setup – First American Funds

- 1) Navigate to [www.dstvision.com](http://www.dstvision.com)
- 2) Click New User?

*DST VISION*

Vision ID

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Password

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**SIGN IN**

[Trouble Signing In?](#)



**NEW USER?**

[Participating Companies](#)

- 3) Click OK on pop-up disclaimer message.

4) Select Tax ID level and click Continue.

**Tax ID Level**

Provides access to all accounts grouped under a single tax identification number. Tax ID access may be appropriate for institutions that use a common Tax ID across their account base. Tax ID access is not available at the shareowner Social Security number level.

**CONTINUE**

5) Search for Investment Consultant in Broker-Dealer section and select in the box below to highlight in blue.

**Broker-Dealer Selection**

Search for broker-dealer:

**SEARCH**

RESET

**CONTINUE**

6) Click Continue.

7) Enter Profile Information for your own user setup.

**Profile Information**

Enter the following profile information:

First Name:                      MI:                      Last Name:

\_\_\_\_\_

Street Address:

\_\_\_\_\_

\_\_\_\_\_

City:                      State/Province:                      Zip:                      Country:

\_\_\_\_\_                                            \_\_\_\_\_ - \_\_\_\_\_                     

Phone:                      Ext: (optional)                      Mobile/Alternate: (optional)

\_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

E-mail  
(business email preferred):

\_\_\_\_\_

**CONTINUE**

8) Click Continue.

9) Click Yes for Mutual Funds assets and No for Alternative Investments assets.

### Profile Information - Tell Us About Your Business

Do you have:	Yes	No
Mutual Fund assets? (Including Qualified Retirement Plan and IRA assets)	<input checked="" type="radio"/>	<input type="radio"/>
Alternative Investments assets?	<input type="radio"/>	<input checked="" type="radio"/>

**CONTINUE**

10) Click Continue.

11) Enter Mother's Maiden Name and select a method of delivery for a security code (mobile phone for text message or email address)

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## Security Profile

Mother's Maiden Name:  
(or other security keyword)

(used for security verification)

Security Code Delivery: ⓘ

For your security, add a phone number or email address to be used to send you a security code in the future:

Step 1: Select how you would like to receive your security code, then enter your information, and click 'Send Code'.

Email Address	_____	SEND CODE	CANCEL
Mobile Phone for Text*			

Email Address

CONTINUE

12) Click Send Code and wait for the code to be delivered via text or email. Code will be delivered within minutes of request.

13) Enter Security Code received.

Step 2: We sent you a security code to the device selected. Enter the code and click 'Verify Code'.

Security Code:	TEST _____	VERIFY CODE	CANCEL
Time Remaining: 29:25	Need another code?		

CONTINUE

14) Click Verify Code.

15) Click Continue.

16) Create a Vision ID, password and Voice PIN using the guidelines outlined.

## ID/Password Establishment

### Establish Your Vision ID and Password

#### 1. Establish your Vision ID

New Vision ID: \_\_\_\_\_

Re-enter new Vision ID: \_\_\_\_\_

- Your new ID is permanent. Once you have established your Vision ID it may **not** be changed. Your Vision ID must meet the following criteria.
  - 7 to 35 characters in length
  - Contain at least one alpha (A-Z)
  - No special characters (@,#,\$ etc.)
  - Cannot be the same as your current ID

#### 2. Establish your Password

Password: \_\_\_\_\_

Re-enter Password: \_\_\_\_\_

- Your Password cannot be the same as your Vision ID and must meet the following criteria.
  - 8 characters in length
  - Contain at least one alpha (A-Z) and one numeric (0-9)
  - Contain at least one of the following special characters @ # % & \* ( ) - / ? \_ = +

### Establish Your Voice PIN

#### 3. Establish Your Voice PIN (used to contact the Customer Support Center) [Why do I need this?](#)

Voice PIN: \_\_\_\_\_

Re-enter Voice PIN: \_\_\_\_\_

- Your Voice PIN must meet the following criteria.
  - 4 to 8 numbers in length

**CONTINUE**

17) Click Continue.

18) Type "First American Funds" in the search field and select First American Funds once populated.

Vision Enrollment [i](#)

**Enrollment Steps**

- Service Level Selection
- Broker-Dealer Selection
- Profile Information
- ID/Password Establishment
- Mutual Fund Selection**
- Alternative Investments Selection
- Annuity Selection
- Program Manager Selection
- Verification

### Mutual Fund Selection

To add mutual funds, select individually from the list. After selection(s) and all criteria are entered, click 'Continue'. If you do not want to enroll for a mutual fund you may proceed by clicking 'Continue'.

My Firm's business [All](#)

Search for Mutual Fund: \_\_\_\_\_

To add, select a mutual fund.

1290 Funds
1919 Funds
Aberdeen-Asset Management
Acadian Funds
AEGON FUNDS
AGF Investments America Inc.
AIC Loomis Sayles
AIG Funds
Akre Capital Management
Alger Funds
AllianceBernstein Investments
Allianz (Instl - Admin/I/P)
Allianz (Retail - A/B/C/D/R)

Enter one sample client account# or Plan ID # for each mutual fund selected.

	One client's account #
Select the available Mgmts from the left side.	

**CONTINUE**

19) Select First American Funds in left hand box to highlight in blue to populate right hand box for Tax ID #.

20) Enter the Tax ID # for the accounts needing to be viewed in the right hand box. If more than one Tax ID # is needing to be requested, select First American Funds again on the left hand side to populate an additional Tax ID # box.

21) Click Continue.

22) Verify the information is correct.

VISION - New Enrollment - Google Chrome  
https://www3.financialtrans.com/ff/Vision/EnrollmentMFMManagementCompanySelectionContinueEvent

DST VISION November 4, 2018

Enrollment Steps

- Service Level Selection
- Broker-Dealer Selection
- Profile Information
- ID/Password Establishment
- Mutual Fund Selection
- Alternative Investments Selection
- Verification**

Verification

Verify your information below. Click Submit to complete the enrollment request.

Broker-Dealer [EDIT](#)

Investment Consultant [EDIT](#)

Profile Information [EDIT](#)

Primary Contact: John D Consultant  
Address: 1 Main St  
City: Anytown  
State: New York  
Zip: 10101-1001  
Phone: 212-555-5555  
Alternate Phone: -  
Email: JDConsultant@yahoo.com

Mother's Maiden Name/Security Keyword: Smith  
What street did you best friend in high school live on? (Enter full name of street only)  
In what city is your vacation home?

ID/Password Establishment [EDIT](#)

Your Vision ID is: JDCONSULTANT Password: \*\*\*\*\* Voice PIN: \*\*\*\*

Mutual Fund Selections [EDIT](#)

Company Name TAX ID#  
BaIRD Funds 555555555

I confirm that the above information is correct.

[SUBMIT](#)

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23) Check the box confirming all information is correct.

24) Click Submit.

25) An email will be sent from DST Vision once access has been approved or denied. Once approved, navigate back to [www.dstvision.com](http://www.dstvision.com) to login using the credentials you have created.