MOmentum Client & MOmentum Mobile FAQs

Former ClientEXP User FAQs

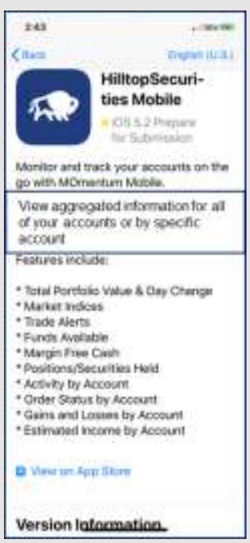
Where can I view MOmentum Client Training Videos?

The videos are located in a card on your Dashboard once you are registered and logged in. Click on these links to view: First Time Registration Video and Dashboard Overview Video.

Q. Is there a MOmentum app? Will it be available for use on the iPhone and Android?

A. MOmentum Mobile will be live on June 1, 2020. It will be available for download in both the Apple AppStore and Google App Store.

The app will not have trading capabilities on Day 1, but we have already submitted requirements to the developer for equity/option trading as well as mobile deposit, ACH and journal functionality.



Q. Will those that currently have access to ClientEXP need to set up a new username & password in MOmentum Client?

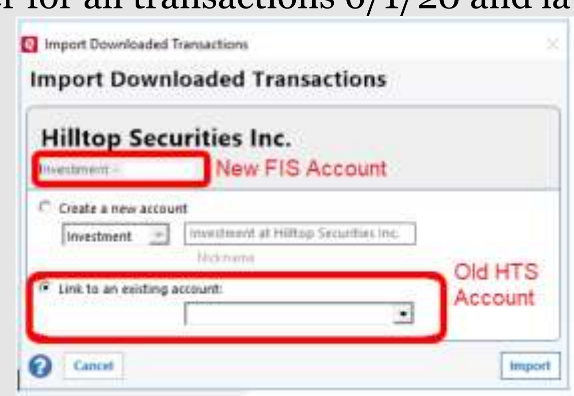
A. No. They will be able to use their existing ClientEXP logons, but they will receive an email with a temporary password. At that point, they can register and establish a new password and One-Time PIN.

Q. How can I register as a new user of MOmentum Mobile?

A. Existing ClientEXP users will first need to go through the MOmentum Client registration process to establish their permanent password and to set up their One-Time PIN device. Next, simply download the app by searching Hilltop Securities Mobile or MOmentum Mobile in the iTunes or Google Store. Look for this App Icon:

Q. Q. Will I need to update the account number to the 8-digit MOmentum number when using the Quicken Download? Will my history be combined?

A. Yes. You will be prompted to “link” your account to the new MOmentum account number. You will be asked to enter the new 8-digit account number and then choose “Link to an existing account” and select the corresponding 9-digit Talisys account number. Your download information will reflect the new account number for all transactions 6/1/20 and later.



New Momentum Client User FAQs

Q. How can I register as a new user of MOmentum Client?

A. Please visit https://momentum.hilltopsecurities.com/investor/HTS to access MOmentum Client. To register for access to MOmentum Client as a new user, please click the link above and select "First Time User? Please Register here".

Please note: **If you are an existing client and do not have an email address associated with your account, please contact your Financial Professional before registering**.

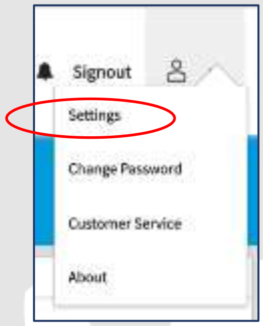
Q. How can I register as a new user of MOmentum Mobile?

A. Registering on MOmentum Client automatically registers you on MOmentum Mobile. The same Logon and Password is used for both applications. Also, the One-Time PIN is for both applications.

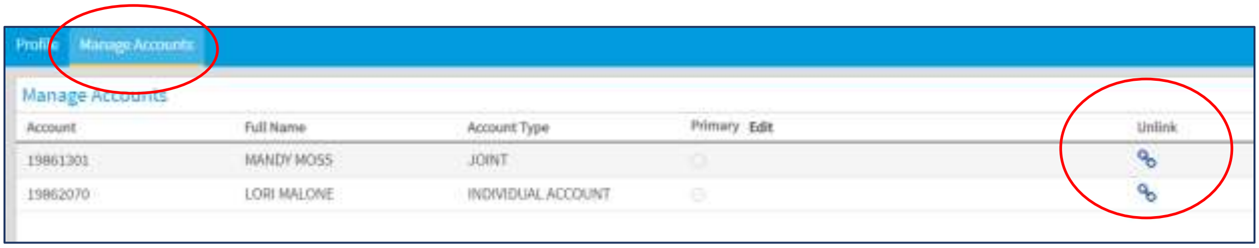
Q. How can I link my related account to my logon?

A. Following the steps below will link related accounts.

Click on the User icon in the upper right-hand corner of the Dashboard and select "Settings":



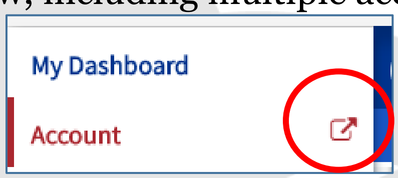
Click on the “Manage Accounts” tab and you will be able to link or unlink any accounts associated with your logon. If you wish to add an account to your existing logon that is not in this list, please contact your Financial Professional.



Dashboard/Account Details/Overview Page/Grids

Q. How can I launch more than one window in MOmentum? For example, can I have tabs open so that I can view two different accounts?

A. Yes. Any time you see this icon in the Menu, it will launch that section in a separate browser window, including multiple account windows.



Q. How many securities may be loaded into the Watchlist tool?

A. There is a 30-symbol limit.

Q. Is it possible to change the width of columns in MOmentum?

A. Yes. Hover your mouse over the edge of the column heading and drag it to the desired width.

Q. Will MOmentum log me off if I leave the system dormant for a period of time?

A. Yes. As a security measure, if the system does not sense activity from the user for 1 hour, it will log you off.

Q. How many securities may be loaded into the Watchlist tool?

A. There is a 30-symbol limit.

Q. When a card is removed from the Dashboard or Overview Page, is it deleted or simply removed from the page? Can it be added back later?

A. Removing a card will only delete it from the Dashboard or Overview page. To add it back, click on the “Select a Card” dropdown on the lower right-hand corner of the screen. Highlight the card you wish to add to the page and click “Add Card”.

Q. Where can I view my ACH bank information? (

A. ACH information is located on the Bank Information Card on the Overview Page.

Bank Information

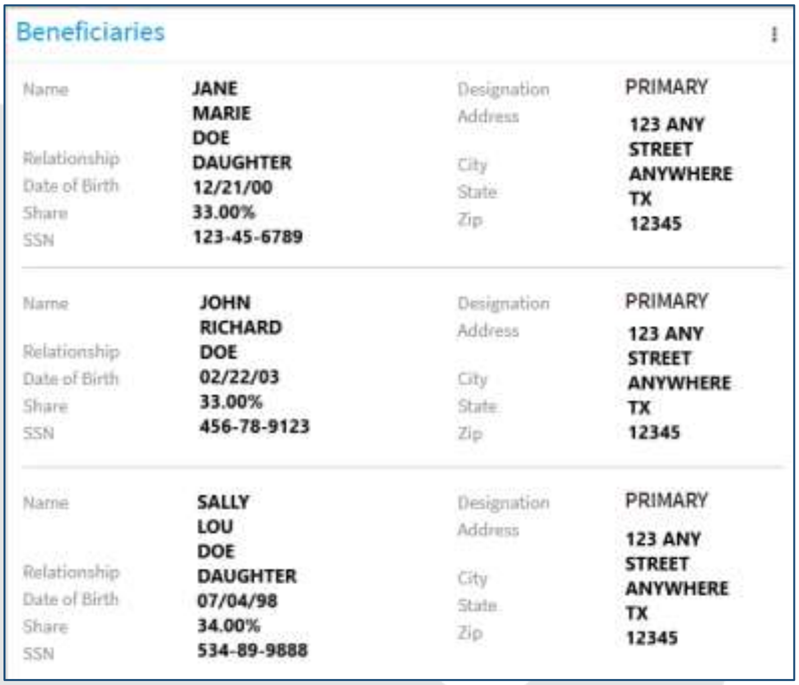
Account Type A	FIRST NATIONAL BANK	Account Type B	MAIN ST CREDIT UNION
ABA Number	123456789	ABA Number	444444444
Account Number	9876543210	Account Number	8787878787
DDA Details for Purchase		DDA Details for Sales	

Q. Are grids able to be sorted and/or exported to Excel?

A. Yes. Click on the column heading to sort any grid. Click on the download icon to download grid information into Excel.

Q. Am I able to see Contribution and Distribution information for my Retirement Account in MOmentum Client?

A. Yes. There are both Contribution and Distribution cards located on the Overview page for all qualified accounts. You can also see detailed Beneficiary information on the Beneficiary card.



Q. If I have a qualified account, where can I see my account's Required Minimum Distribution information?

A. Your Current and Prior Year RMD information, along with other important details related to your Retirement Account are located on the IRA Card which is located on the Overview Page within the Account section MOmentum:

IRA

IRA Type	I - IRA	Last Disbursement	00/00/0000
Date of Birth	04/25/1945	Amount	$0.00
Turns 59 1/2	10/25/2004	Federal Withholding	0 %
Turns 72	04/25/2017	State Withholding	0 %
Current Year RMD	$3,703.27		
Prior Year RMD	$0.00		
Fair Market Value	$84,804.92		
Factor	22.9		

Q. Where can I see upcoming money movements or Recurring ACH instructions?

A. You can see Recurring ACH instructions on the Payments/Withdrawals card on the Overview screen. Note that you can see if the client is set up for Recurring ACH, On Demand ACH, or both.
Dividend and Interest payments are not shown on this card:

Payments/Withdrawals

RECURRING   ON DEMAND

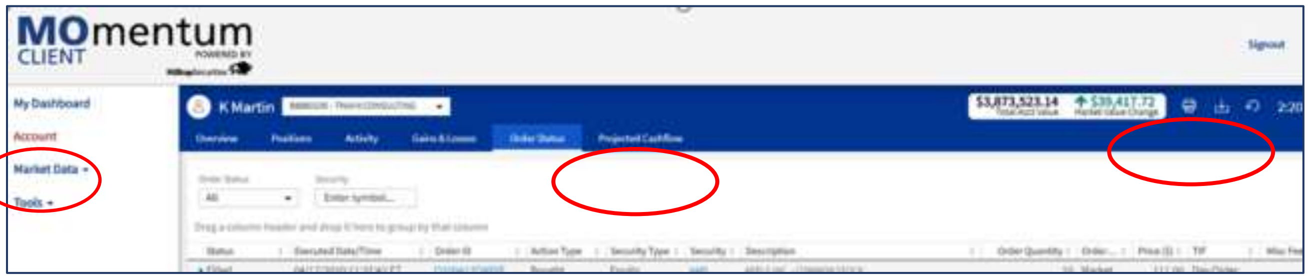
Amount	$5,000.00	Start Date	9/23/2019
Payee Name	JANE DOE TRUST #2	Event Date	6/10/2020
Frequency	Monthly	End Date	OPEN
Payment Method	ACHT		

Due to holidays, weekends or months with less than 31 days, All Event Dates are approximate.

Q. Are details of Estimated Annual Income available in MOmentum Client and MOmentum Mobile?

A. Yes. This information is in the Account section of MOmentum Client and Mobile. Click on the “Projected Cashflow” and choose the desired timeframe (you can see the current and remaining months of the current year and the entire next year at any time. In MOmentum Client, click the “Download” icon and the data will be sent to an Excel Spreadsheet that is formatted with the client's name, account number and totals the month, year and a grand total, if necessary.

Estimated Income can be viewed by monthly totals, or you can choose to see more detail by security, by choosing between the toggle bar:



Q. How can I setup Direct Deposit from my employer?

A. Please contact your Financial Professional for the appropriate Direct Deposit form. Her/his contact information can be found on the My Financial Professional Card on the Overview Screen.

Trading Capabilities/Equity, Option, Mutual Fund Order Entry

Q. Is there trading capability in MOmentum Client?

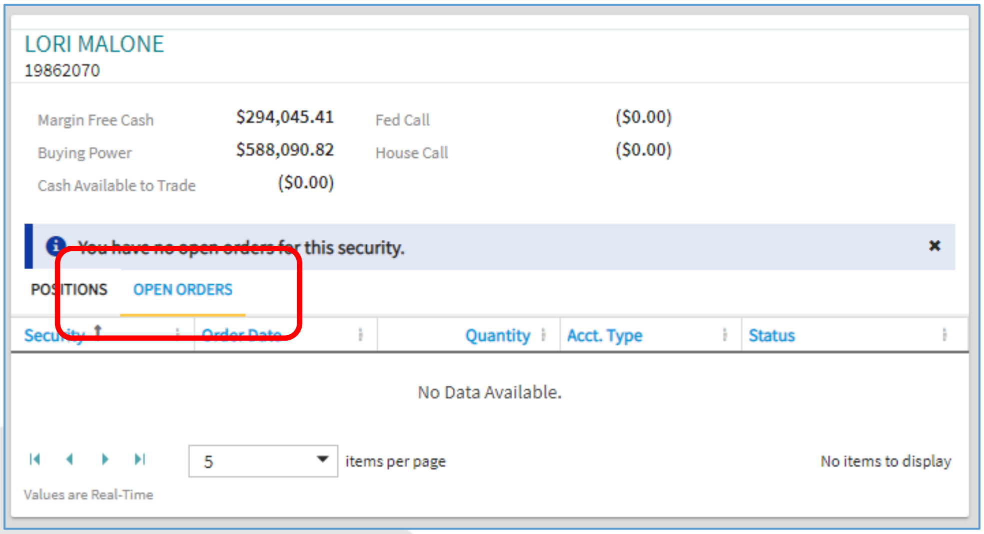
A. Yes, however,trading entitlements are enabled at your Broker/Dealer level. Please contact your Financial Professional to learn more.

Q. May I change an open order in MOmentum after market close?

A. Currently, no. You can only cancel an open order after market close. This is a known issue that is being addressed due to CAT regulations. We expect to have this resolved by late July.

Q. Will MOmentum return an edit if I attempt to enter a duplicate of an existing open order?

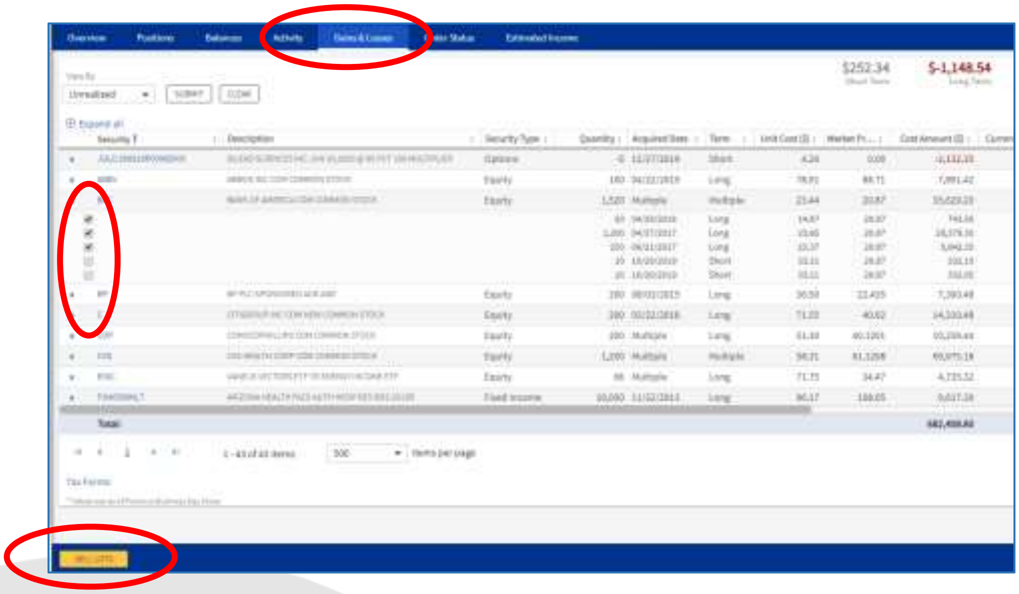
A. No. Please check the Open Orders tab on the Order Entry screen to verify if you have any open orders for the client and symbol:



Q. How do you sell specific tax lots in MOmentum on specific tax lots?

A. Yes. From the Gains & Losses page in the Account section of MOmentum, click on the green carrot on the left-hand side of the screen to expand the position in order to see all available tax lots. Check the boxes of the lots you wish to sell and click the “Sell Lots” button in the lower left-hand corner.

This will take you to a pre-populated order entry screen.



Q. Can a mutual fund order be cancelled before the market close?

A. Yes, in MOmentum Advisor, you will now be able to cancel a mutual fund order prior to the fund family's closing time, which is typically market close (4PM ET). However, please note that some fund families do close earlier—such as Vanguard and ProFunds.

Statements/Confirms/Client Letters

Q. Can a new Statement Householding group be established in MOmentum?

A. Yes. Please contact your Financial Professional to establish a statement household. This will provide you with Household Summary Cover page. All statements in a household will be produced each month.

Q. Does Hilltop offer check writing capabilities on brokerage accounts?

A. Yes. We do allow check-writing on brokerage accounts. Please contact your Financial Professional for our Vision Checking Application Agreement.

Q. Does Hilltop Securities offer tax advice?

A. No. Please contact a tax advisor for professional tax advice.