



Frequently Asked Questions:

How can I enroll in InnoVue to access my account online?

Please call us to request access at (941) 366-7222.

I'm having trouble using InnoVue and don't understand some of the information displayed on my account. Who can help?

Please call your relationship manager at (941) 366-7222.

I have enrolled in InnoVue and received my user ID and temporary password. How do I log in for the first time?

Visit CNTrustCompany.com, under Online Services Login dropdown, select "Wealth Reporter / InnoVue" to redirect to the InnoVue login page. Choose Private or Public computer type, enter your User ID and temporary password, then follow the steps. You will first decide to accept the terms and conditions. Upon acceptance, you will confirm your account via email, reset your password, update your profile's security question and answer, and create a pass phrase.

What is a pass phrase?

A pass phrase is used as an additional layer of account authentication when logging in from a Public or Shared computer. Strong pass phrases are generally longer than a password and should be unique, yet easy to remember.

What happens if I forget my password?

On the InnoVue login page, simply click the forgotten password link located under the "Password" text box and follow the steps that follow. You will receive a temporary password via email, and will be able to reset your password to access your account.

Why is the log on process different when using a Public computer?

To protect your account from fraudulent activity, you will need to confirm your security image, pass phrase, answer your security question and enter your password. If anything appears different than what you expect, or if you are suspicious of fraudulent activity, please contact your relationship manager at (941) 366-7222.

How do I update my security information to protect my portfolio?

Click on "My Account", click "Edit", update your entries, and click "Submit".

How do I change my password?

Click on "My Account", click "Change Password", enter your current password, new password, and re-enter your new password, then click "Submit".

Do I need to upgrade my browser or operating system to use InnoVue?

InnoVue supports the most recent three versions of all browsers and operating systems. If you are having compatibility issues, please contact your relationship manager at (941) 366-7222.

Is my account information up-to-date?

Transactional information on InnoVue is in real time (the moment you view it). Market values are displayed as of the market close of the prior business day.

I have multiple accounts. Can I aggregate them?

InnoVue features "Account Groups" to allow you to aggregate multiple accounts together to better organize your portfolio. Under Portfolio, click on the menu item "Account Groups", and select "Create" to begin the process.

Am I able to export account information to a spreadsheet?

Yes. Within the "Portfolio" navigation tab, you are able to export the Holdings List, Investment Detail, Tax Lots, Transactions, into an Excel or CSV file type. Click the button labeled "CSV" or "Excel" within the Criteria box, then click "Save" or "Open" to access the spreadsheet.

How many months of history are available for statements and account activity?

At least two years of history will be available.