



Texas User Provisioning Guide

This guide is for your use in setting up access to the new Envision platform. Please read the summary below and follow the step-by-step instructions to complete your registration on the new platform.

One-time provisioning summary:

Each participant who has online access will receive two email messages. One message will contain the participant's current web username and a link to the portal registration form. The second message provides a security code. Upon selection of the link, the participant's username auto populates on the registration form. The participant enters the provided security code and agrees to terms. The form then advances to subsequent registration screens. Participants can log into the portal upon successful completion of the registration process.

Step 1: Receipt of User Provisioning email message and Security Code email message.

Provisioning email:

Internet Portal Access

Hello [REDACTED]

We recently received a request to enable internet portal access for your account. Please click on the link below to verify your details and complete the User Setup. [Click here](#)

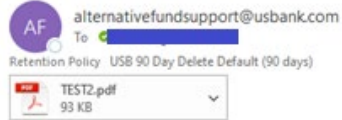
Sincerely,
Investor Services

Please do not reply to this email. Contact Texas Fixed Income Trust Investor Services at 888.435.0021, if you have any questions or concerns.

Security Code email and attachment

Email:

TX-FIT Portal Access



Expires: 2/5/2023

Dear TX-FIT Participant,

I hope this email finds you well. Please find the attached letter which contains information that is needed to access the portal. Thank you for your participation in TX-FIT!
The TX-FIT Team

Attachment:



Dear Participant,

This letter is to inform you that your account is available for you to view online. You will receive a second email containing a link to establish your online account access. To complete your online account access, you will need the security code provided below:

Security Code: 1234567

If you need help accessing the Texas Fixed Income Trust portal, please contact U.S. Bank Global Fund Services at 888-435-0021.

Thank you,

Texas Fixed Income Trust
<https://tx-fit.com>

Step 2: Begin registration process.

Participant clicks link and is taken to registration page.



Create New User

* Required fields are marked by asterisk

To access your account information online, you'll need to complete a brief registration process. To begin, enter your information below to help us verify your identity.

Your User Name should be between 6 and 12 characters without spaces, including digits and special characters (-_!@#\$%^&*.).

User Name*

Security Code*

Required



Cancel

Next

(F) To ensure that each person to whom information is disclosed in the circumstances set out above complies with the terms hereof as if that person were giving the undertakings being given by you hereunder.

I Agree

Cancel

Next

User Name is auto filled. The Security Code is entered by the participant. The participant agrees to terms via a checkbox and selects Next.

Step 3: Establish two-factor authentication

The participant advances to the next registration page to verify their email address on record.



Create New User - Multi Factor Authentication

Your account is protected with Multi Factor Authentication. Choose an authentication method to complete registration.

Email

Email Me

Cancel



Click on Email Me. A one-time passcode is sent to the participant's email address.

Security Code Sent for Sign up Online Access

Hello

Your Security Code for Sign up Online Access is

Sincerely,
Investor Services

Please do not reply to this email. Contact Texas Fixed Income Trust Investor Services at 888.435.0021 if you have any questions or concerns.

One-time pass code delivered via email.

One-time passcode entry screen



Create New User - Multi Factor Authentication

We have sent a verification code . Enter the code to verify this device.

Enter authentication code

Code



[Didn't receive a code?](#)


Cancel


Next

Users input security code. Click Next.



Step 4: Participant creates password and answers security questions.







Enter Password
..... 

Confirm Password
..... 

Please answer the below questions.

What color was your first car? 
.... 

What is your pet's name? 
.... 

What city were you born in? 
.... 

Click Submit. This concludes the one-time registration process.

Step 5: The participant is taken to main login screen.



Log In

[Forgot User Name](#)

Enter Password [Forgot Password/Unlock User Id](#)

Remember my User Name



Enter User Name and Password. If desired, Participants can select check box to remember their User Name.

The two-factor authentication screen is presented.



Multi Factor Authentication

Your account is protected with Multi Factor Authentication. Choose an authentication method.

Email

Select Email Me.

The participant receives a one-time security code via email.

Security Code Sent for Login

Hello

Your Security Code for Login is

Sincerely,
Investor Services

Please do not reply to this email. Contact Texas Fixed Income Trust Investor Services at 888.435.0021 if you have any questions or concerns.


Participant enters security code on subsequent screen.



Multi Factor Authentication

We have sent a verification code . Enter the code to verify this device.

Enter authentication code

Code  [Didn't receive a code?](#)

Don't ask for codes on this device.

If desired, participants can select check box to skip entering security codes. This is device specific.

Once the security code is verified, authentication is complete. The participant is logged in.

A screenshot of the Texas FIT user dashboard. On the left is a navigation menu with items: Find Account, Documents, eDocuments, Fund Information, NAV Performance, Distributions, Historical Prices, User Settings, Profile Settings, and Logout. The main content area shows the Texas FIT logo, a 'Last successful login 10/31/2022 02:46 PM' message, a 'Find Account' search box with a dropdown arrow and the text 'Enter the Search Criteria', and an 'Export to Excel' link. Below the search box is a table with columns: Name, Account Number, BIN, Account Type, and Rep (Dealer # - Branch #). The table is currently empty.

PAPort sends event driven email messages. For example, the participant will receive an email confirming the login.

Successful Login

Hello [REDACTED]

Login successful on 10/31/22 2:56:32 PM from 170.135.241.45. If you believe an unauthorized person has accessed your account, please contact us immediately.

Sincerely,
Investor Services

Please do not reply to this email. Contact Texas Fixed Income Trust Investor Services at 888.435.0021 if you have any questions or concerns.