Important Dates and Information

For your convenience, below is a list of important dates and information relating to the upcoming software upgrade. Please be sure to keep this document handy for easy reference, as it includes things you need to know and actions you need to take. If you have any questions, please reach out to your Relationship Manager.

When will Bangor Wealth Management be upgrading their software system?

Starting at 5:00 pm on Friday, April 29, 2022 and continuing through completion, which we anticipate to be Sunday, May 1, 2022.

Your current Bangor Wealth online portal will be unavailable from 5:00 pm on Friday, April 29, 2022 through 8:00 am on Monday, May 2, 2022.

What if I have a scheduled month-end disbursement; will it be processed a few days early?

April scheduled month-end disbursements will be processed on Wednesday, April 27, 2022.

Will print and online statements be different?

Print and online statements have the same great information with a fresh new look and feel.

Monthly Statements

- There will be a final statement on the old system as of 4/30.
- The first statement on the new system will reflect the new look and feel, covering the period from 5/1 to 5/31.

Quarterly Statements

- There will be two statements in the second quarter, the first statement will reflect your current statement format from the old system and cover the period 4/1 to 4/30 and the second statement will reflect the new statement layout covering the period from 5/1 to 6/30.

Annual Statements

- There will be two statements this year, the first statement will reflect your current statement format from the old system and cover the period 1/1 to 4/30 and the second statement will reflect the new statement layout covering the period from 5/1 to 12/31.

Year-to-Date Totals

- Your year-to-date totals will be suppressed through the end of the year, due to the mid-year migration to the new system. They will be available starting January 2023.

Required Minimum Distribution (RMD) amounts will be included for applicable IRA accounts.

You will now be able to view accrued income on your statement.

What will happen to my information on the current Bangor Wealth Management online portal?

Information on your current Bangor Wealth online portal will become static as of 4/30. You will have view only access to activity and statements through 5/31.

How do I access the new online portal?

This software upgrade features a new online portal for you that includes all the same great information. The new URL will be available on **www.bangor.com** beginning 5/9.

If you are a current online user, your user ID will remain the same. You will, however, be required to select a new password, during your first login.

A temporary password will be sent to your email address on file, during the week of 5/2.

A User Guide will be available on **www.bangor.com/bangorwealthonline.**

What information from my current online portal will remain available to me to access?

If you utilize our online portal, the following information will be available.

- 17 months of historical transactions
- 24 months of historical statements

More Information Available at
www.bangor.com/bangorwealthonline

Wealth Management products are:
Not FDIC Insured | No Bank Guarantee | May Lose Value

Bangor Wealth Management of New Hampshire