## U.S. Bank Global Fund Services

# DST Vision New User Setup for First American Funds

2025

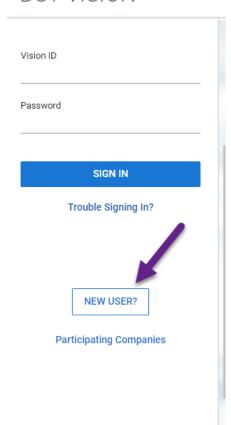
## FIRST AMERICAN FUNDS.

us bancorp. Asset Management, Advisor

# DST VISION NEW USER SETUP

- 1. Navigate to **DST Vision**
- 2. Click on the New User button.

### **DST VISION**

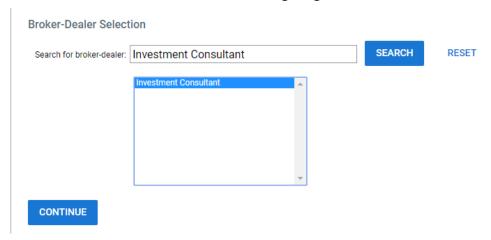


- 3. Click OK on pop-up disclaimer message.
- 4. Select Tax ID level and click Continue.
  - Tax ID Level

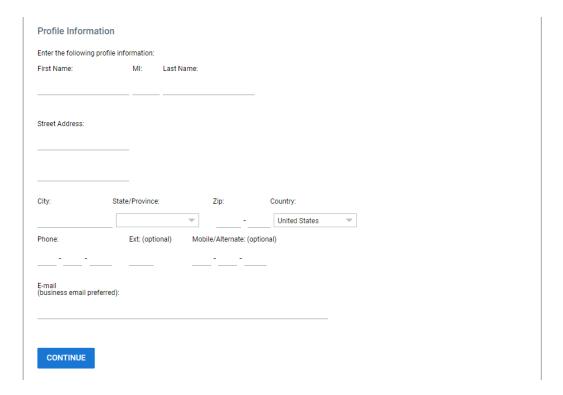
Provides access to all accounts grouped under a single tax identification number. Tax ID access may be appropriate for institutions that use a common Tax ID across their account base. Tax ID access is not available at the shareowner Social Security number level.

CONTINUE

- 5. Search for Investment Consultant in Broker-Dealer section.
- 6. Select in the box below to highlight in blue.

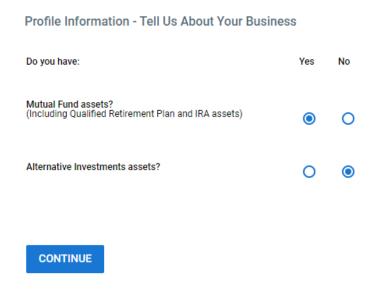


- 7. Click Continue.
- 8. Enter Profile Information for your own user setup.

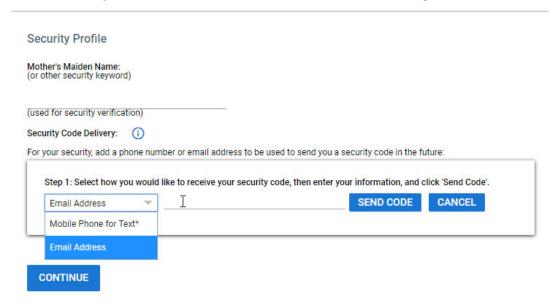


9. Click Continue.

10. Select whether you are a Mutual Fund or Alternative Investment's business.



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



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

#### 14. Enter Security Code received

	TEST	VERIFY CODE C	ANCEL
naining: 29:25	Need another code?		
ining: 29:25	Need another code?		

- 15. Click Verify Code.
- 16. Click Continue.
- 17. Create a Vision ID, password and Voice PIN using the guidelines outlined.

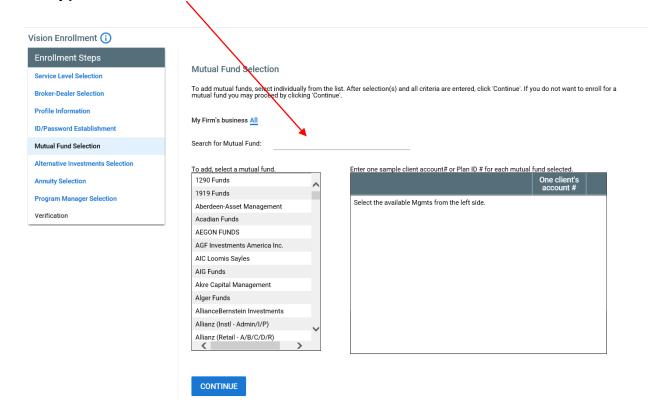
**ID/Password Establishment** Establish Your Vision ID and Password 1. Establish your Vision ID New Vision ID: Re-enter new Vision ID: Your new ID is permanent. Once you have established your Vision ID it may not be changed. Your Vision ID must meet the following criteria. criteria.
- 7 to 35 characters 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

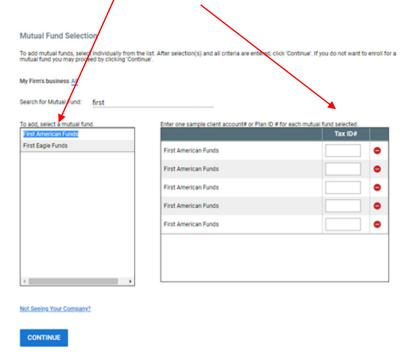
(@ # % & \* () - / ? \_ = + Establish Your Voice PIN 3. Establish Your Voice PIN 🕲 (used to contact the Customer Support Center) Why do I need th Re-enter Voice PIN: Your Voice PIN must meet the following criteria.
 4 to 8 numbers in length CONTINUE

18. Click Continue.

19. Type "First American Funds" in the search field.

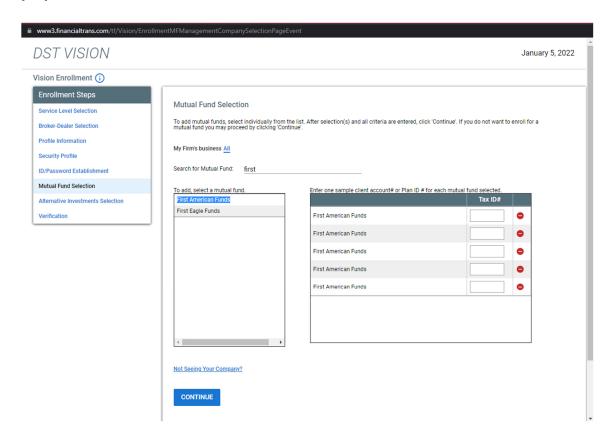


20. Select First American Funds in left hand box. Once it is highlighted in blue it will populate the right-hand box so you can enter the account Tax ID #.



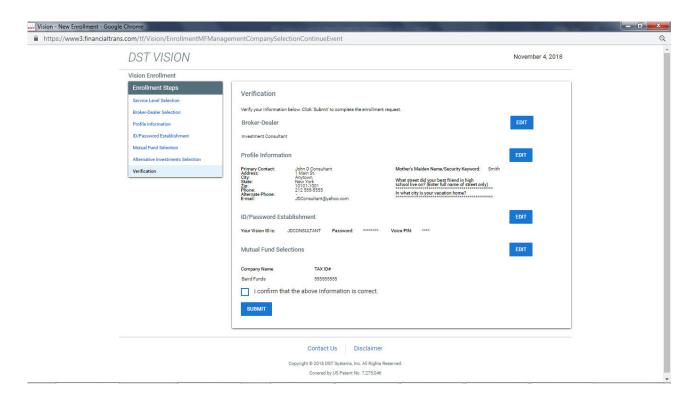
21. Enter the Tax ID # for the accounts needing to be viewed in the right-hand box.

If more than one account Tax ID # is needing to be requested, select First American Funds again on the left-hand side to populate an additional Tax ID # box.



22. Click Continue.

23. Verify the information is correct.



- 24. Check the box confirming all information is correct.
- 25. Click Submit.
- 26. An email will be sent from the DST Vision Team once access has been approved or denied. Once approved, navigate back to DST Vision to login using the credentials you have created: DST Vision