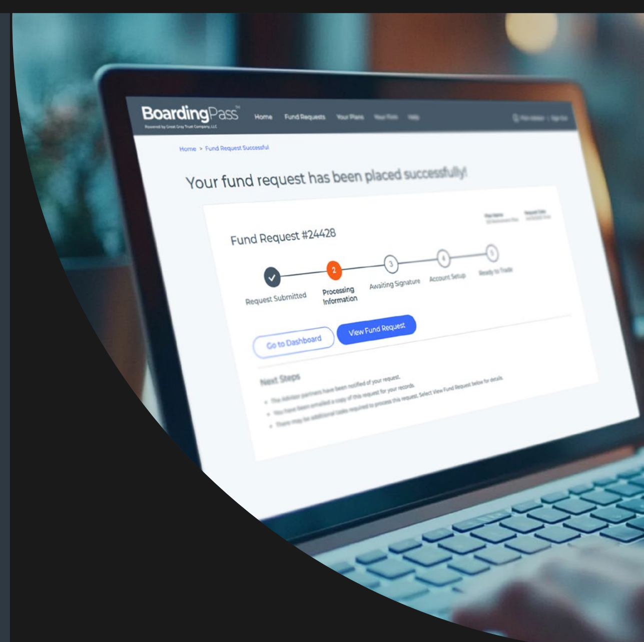
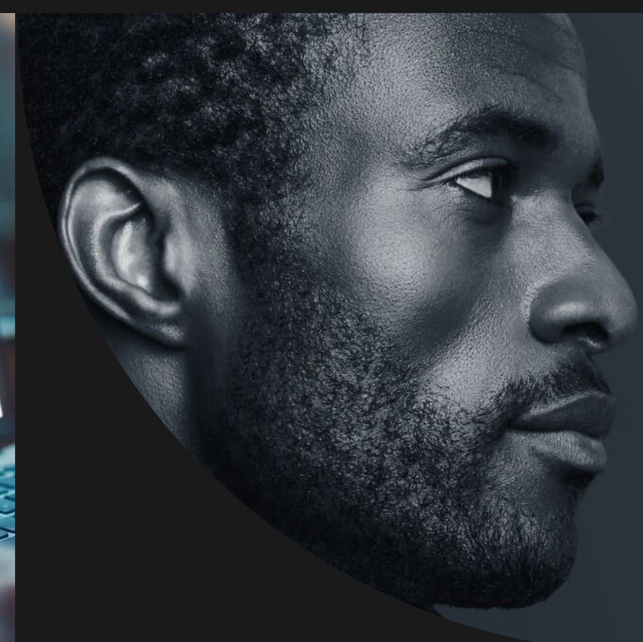
GREAT GRAY
TRUST COMPANY

GET STARTED WITH
BoardingPass®





Collective Investment Trusts (CITs) Defined

Tax-exempt, pooled investment vehicles

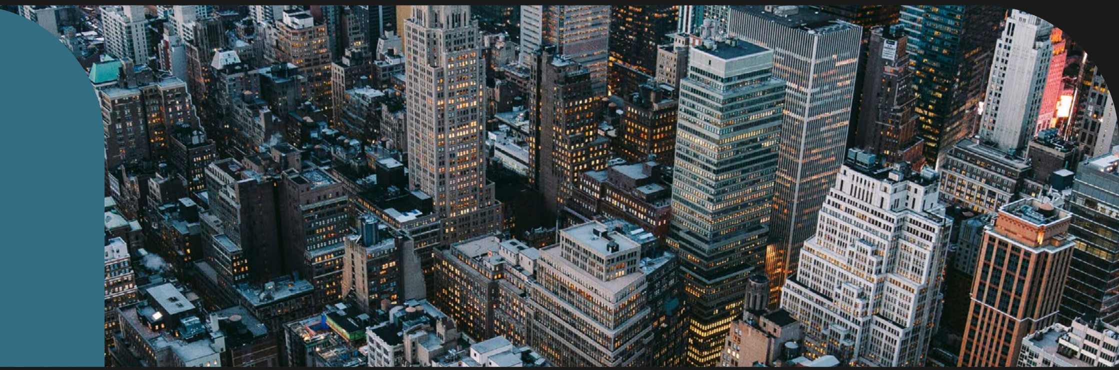
Sponsored and maintained by a trustee

Combine assets from eligible investors into a single fund to pursue investment objectives and strategies

CITs can reduce overall costs, are transparent and offer enhanced investor protections

However, one of the biggest challenges to CIT adoption historically has been paper-based, time-consuming onboarding. With BoardingPass, tasks that typically take days, weeks, or even months to finish can now be completed in just a few hours.

Submit a fund request on-the-go, in between client meetings, in less than 5 minutes. Spend less time on tedious tasks and more time building your book of business.



BoardingPass?

CIT Onboarding. Simplified.

Request.

Review.

Ready to Trade.

- Submit a request in under 5 minutes
- Trade faster without paper
- Built for speed, accuracy, and real-time tracking

Don’t be one of the last advisors still using paper-based onboarding.

Status Quo	BoardingPass
Manual request processing	Digitally-based workflow leverages key industry data
Service Level Agreements > 1 week	Participation agreements ready to trade in less than a day
Manual agreement checking	100+ data points checked on every request
Multiple agreements stored in various locations	Agreements stored in a single repository

Don’t Take Our Word for It:

BoardingPass is magic with how easy it is to work with. BoardingPass has helped to improve the previous paperwork process. The tool helps to pre-fill the majority off the documents, making the overall (onboarding) process much more efficient.

Kevin is an advisor to a plan that invested in a Great Gray collective fund and was not compensated for his statement.

Kevin Kaiser, Sr. Investment Advisor

This guide provides step-by-step instructions for you to navigate easily through the platform—covering various tasks such as registration, new fund requests, adding advisor offices, and more. If you have any questions, contact your Qualified Plan Strategist or email boardingpasssupport@greatgray.com.

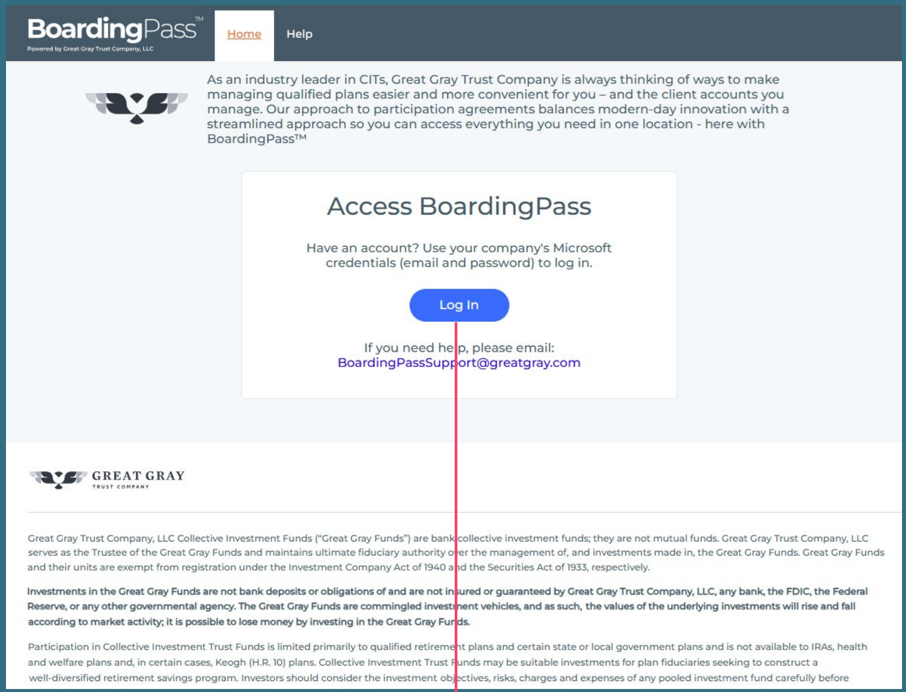
How to Register

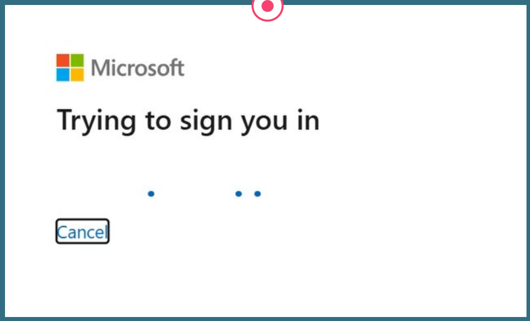
Watch for a Welcome email from Great Gray Trust Company with subject line “Welcome to BoardingPass powered by Great Gray”.
This email will include a link to join BoardingPass

Once the home page loads, click the Log In button

If your company uses Microsoft already, you will be logged in automatically, as BoardingPass is powered by Microsoft. If your company does not use Microsoft 365, there is another way to log in. Creating a Microsoft account is simple and free.

It is suggested you use your work email address as your username and create a secure distinct password to login. You can create a Microsoft account by clicking sign- in. If you run into any issues, please contact us at BoardingPassSupport@greatgray.com or call 866-427-6885 for further assistance.





Request Access to BoardingPass From Your IT Team (if applicable)

Now that BoardingPass uses your Microsoft account login, your company may have security policies that must be followed. If you encounter a screen asking for approval from your firm's IT department, your company's policy requires they approve the app / website before you can use it. We suggest entering the following verbiage to submit for approval, such as:

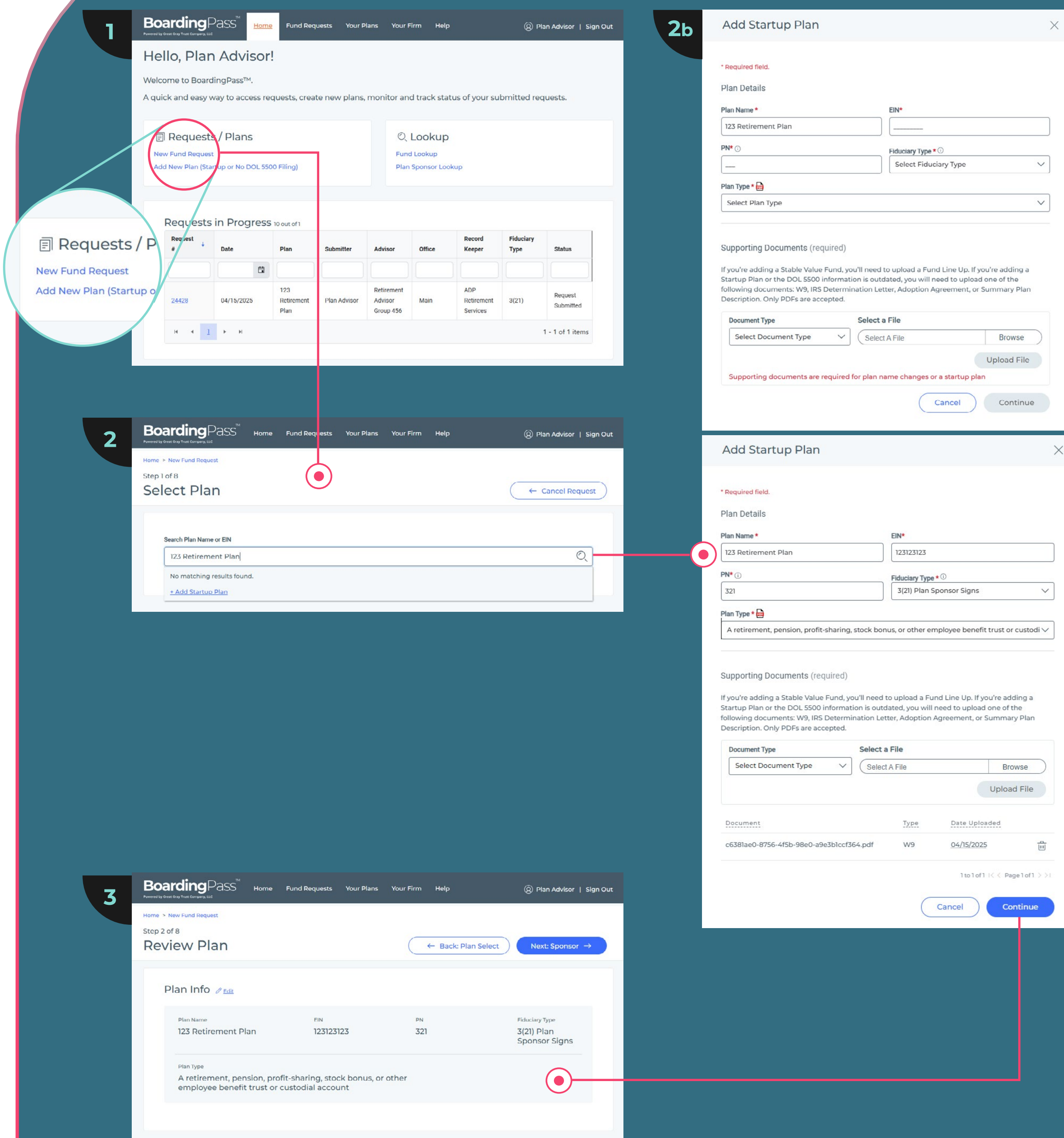
"BoardingPass is a proprietary application powered by Great Gray Trust Company used to manage and onboard retirement plan investors in collective investment trusts (CITs) and is needed as part of my business responsibilities."

How to Submit a New Fund Request

1. Choose **“New Fund Request”** from the “Requests / Plans” section of the dashboard to start the process.

2. The first step will let you chose a plan you are working on. Start by typing the name of your plan in the textbox, then click the name from the drop down to select it. You may be asked to add any missing information before proceeding to the next step.

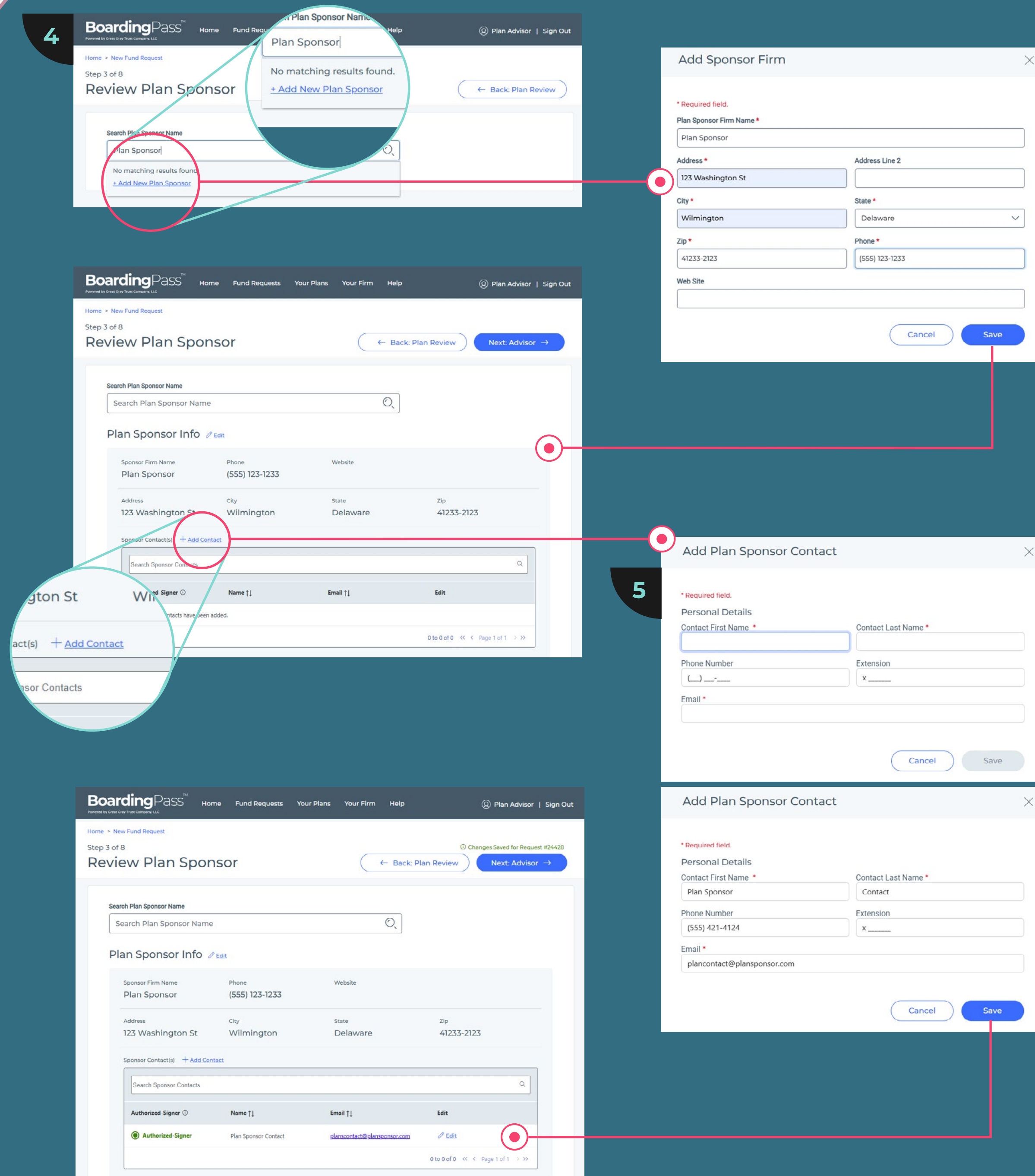
3. On Step 2, you will be asked to review all the plan information. Once everything looks correct, click the button in the top right labeled “Next: Sponsor”



How to Submit a New Fund Request CONT'D

4 You will be asked to fill in and verify all Plan Sponsor information in Step 3. Based on the plan, the sponsor may be pre-selected. Otherwise, type the sponsor name in the textbox and select it from the dropdown list.

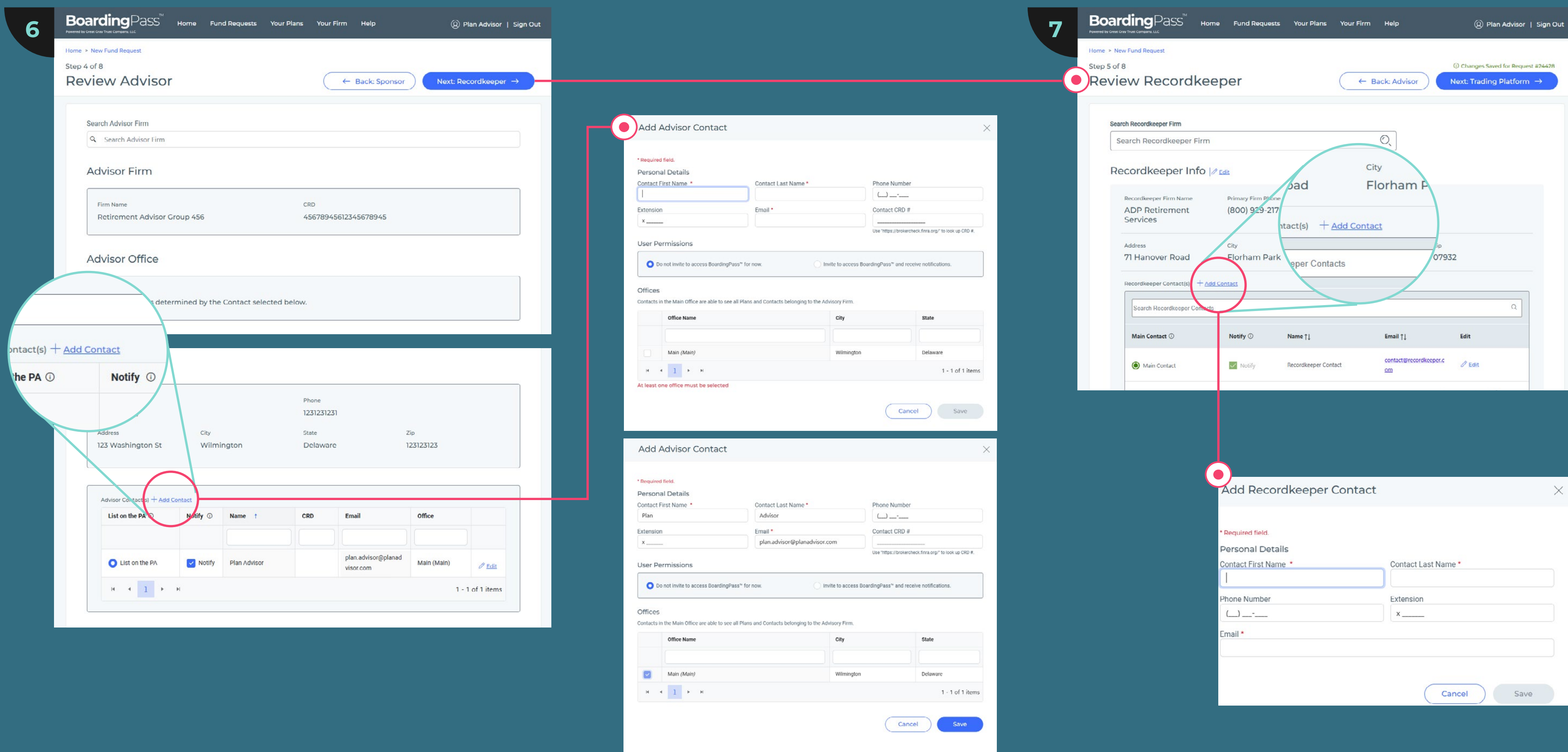
5 While still on Step 3, you will need to select which Sponsor Contact should be listed on the Participation Agreement (PA) in the grid at the bottom of the page. Select the radio button next to the Contact's name you want listed to select them. When you have done so, click the "Next: Advisor" button in the top right.



How to Submit a New Fund Request CONT'D

6 Your Advisor firm's information will be listed on Step 4. Once you confirm the information is correct, scroll to the bottom and select which Contact should be listed on the PA. Finally, click the "Next: Recordkeeper" button in the top right.

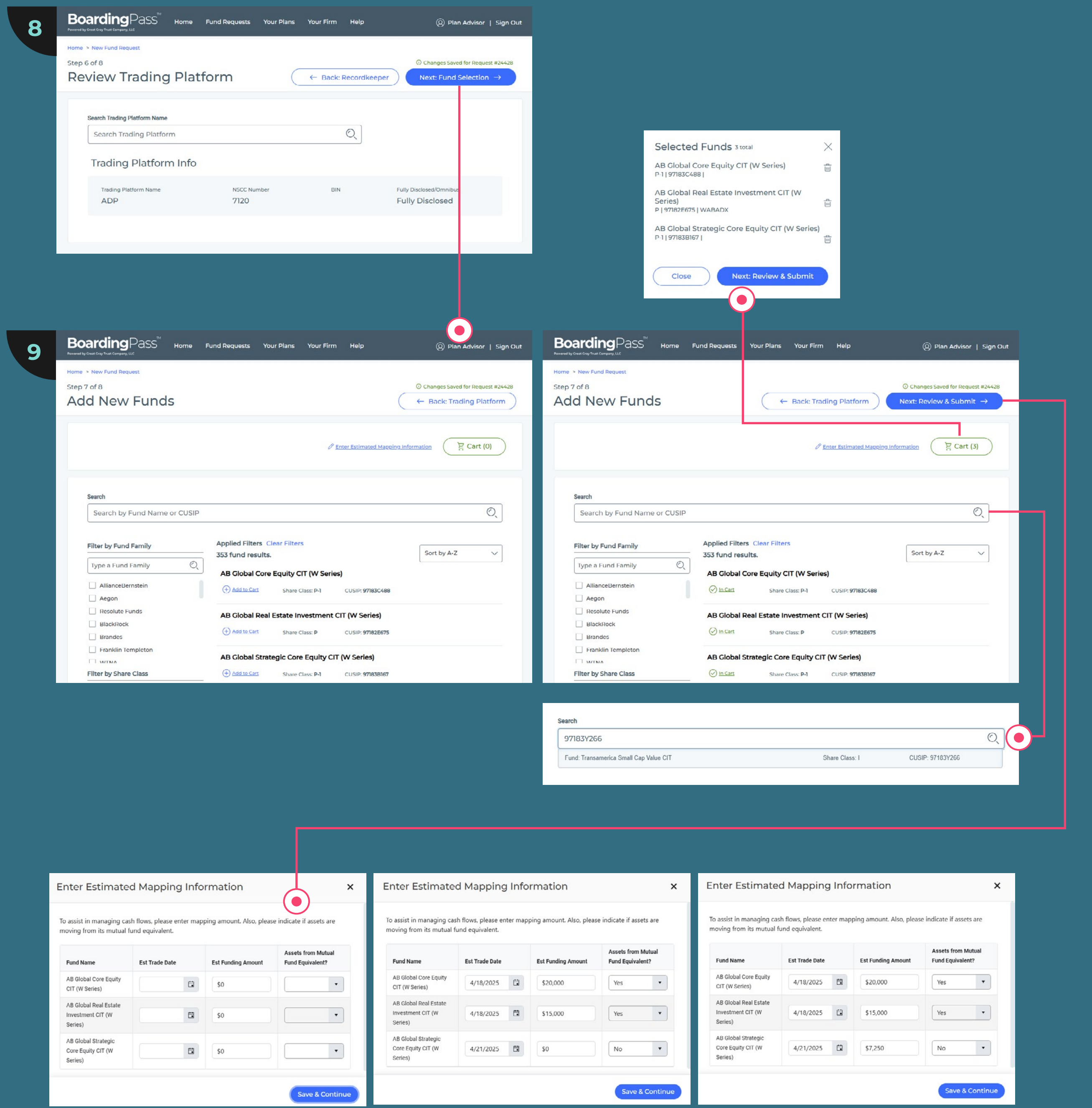
7 On Step 5, you can select the Recordkeeper for this Participation Agreement. Begin by typing the Recordkeeper's name in the search box, then select it from the dropdown. Finally, scroll down to the Contacts grid and select the person you want listed on the PA. When you are done, click the "Next: Trading Platform" button.



How to Submit a New Fund Request CONT'D

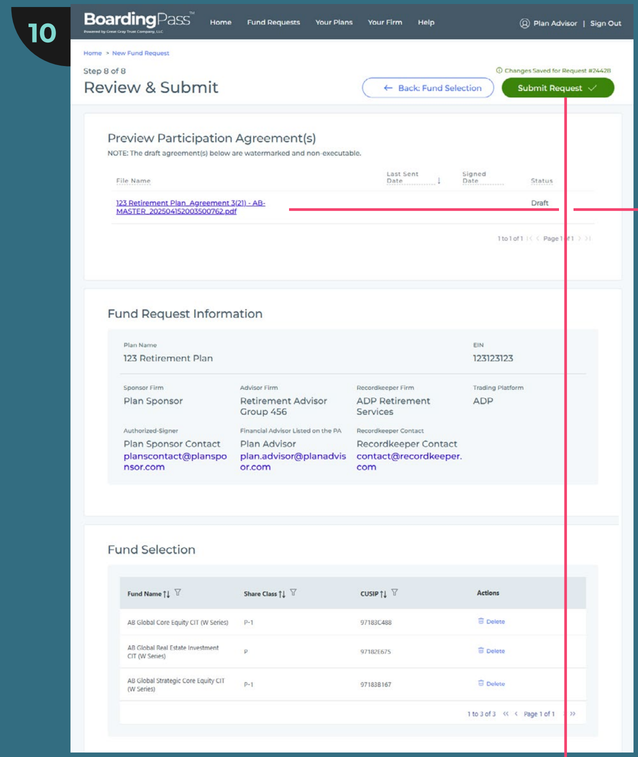
8 Step 6 allows you to select which Trading Platform to list on the Participation Agreement. This may be pre-populated based on the selected Recordkeeper.

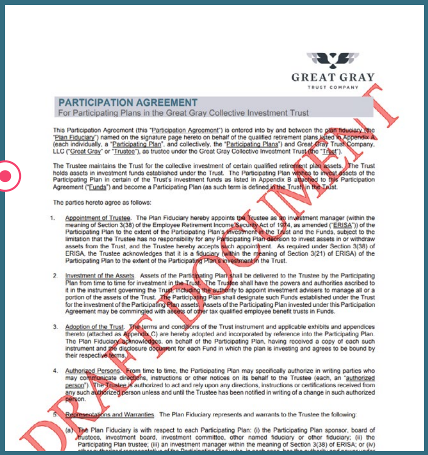
9 The next step allows you to choose what Funds you are adding to the Plan. You can search by CUSIP, or use the filters to narrow down your search. Clicking the plus icon next to a Fund will add it to your cart. When you are complete, click the "Next: Review" button at the top right.

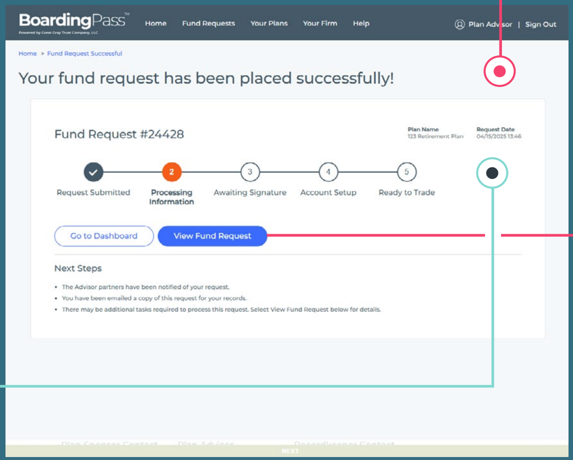


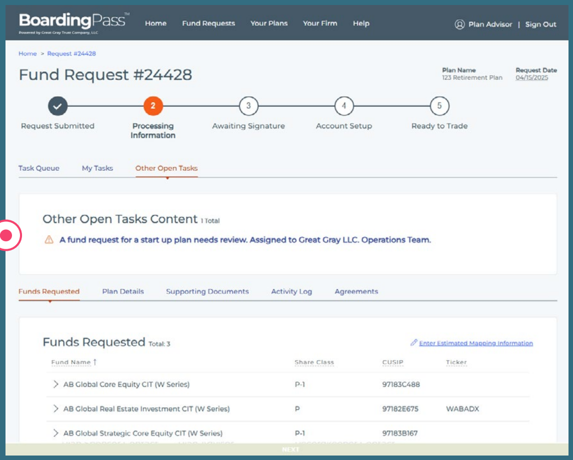
How to Submit a New Fund Request CONT'D

10 The final step offers a chance to review all of the information you have entered. Once you are sure everything is correct, click the "Submit Request" button at the top right.









You can track where your fund request is in the process until it is Ready to Trade.

Leveraging Advisor Offices

- Every firm is set up with a “Main” office which allows you to see all plans and contacts in the entire firm
- For advisors that have multiple offices, this feature improves visibility across multiple offices of an Advisor Firm and is based on feedback from advisors like you.

Why This Is Important:

Offices under the same Advisor Firm can now view each other’s activities for better coordination and support.

Now, you can manage and track plans seamlessly when working across offices.

What You Must Do If You Want to Benefit:

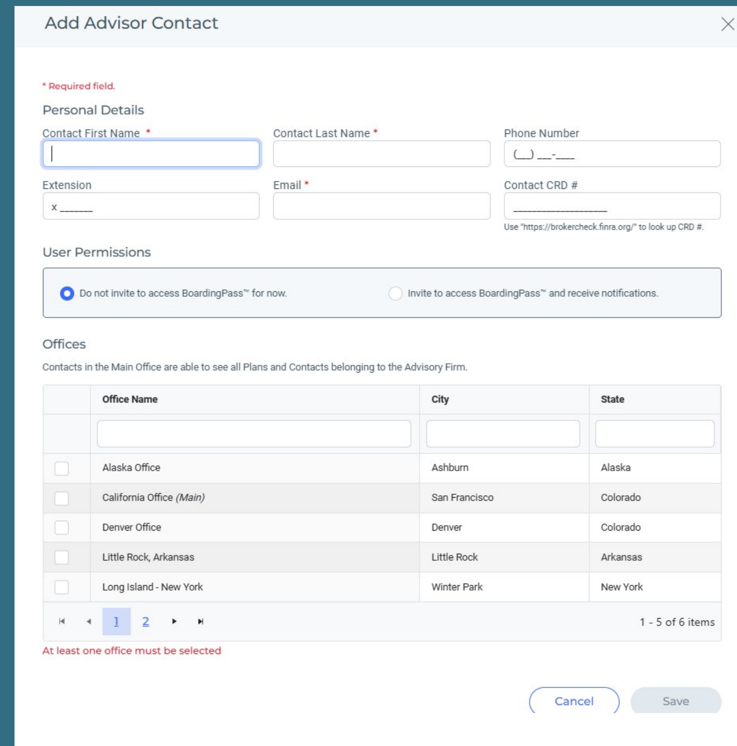
Opt-In to Enable the Feature: Reply to this email or send a new message to boardingpasssupport@greatgray.com with “OPT-IN” in the body.”

Align Your Firm: Your office will be grouped under your overarching Advisor Firm.

Summary:

Single Office Advisors: No action needed-nothing changes for you.

Multi-office Advisors: Opt-in to gain full visibility into activities, plans, and requests across multiple offices. This ensures streamlined collaboration and support.



How to Resend a Participation Agreement

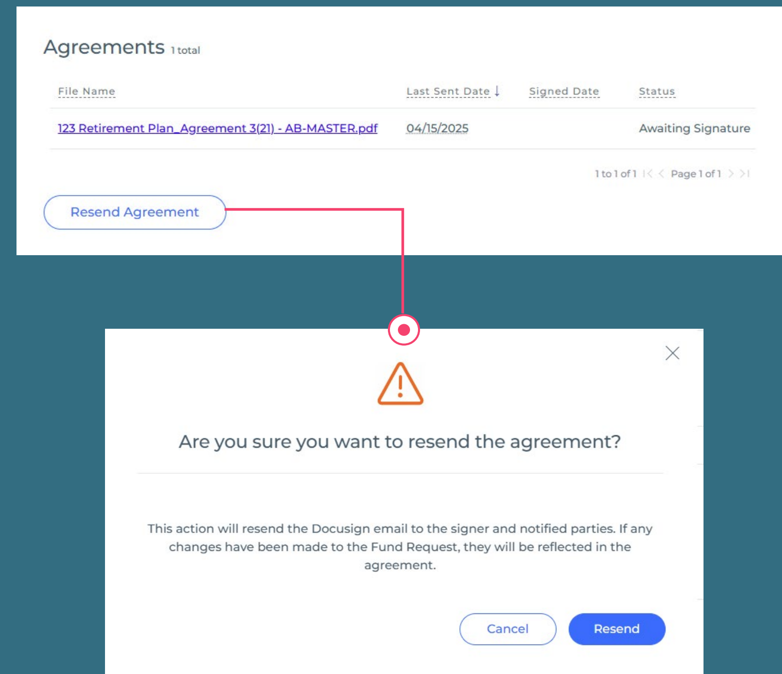
Once you submit a Fund Request and all tasks are marked as complete, a Participation Agreement is generated and sent for signature via DocuSign

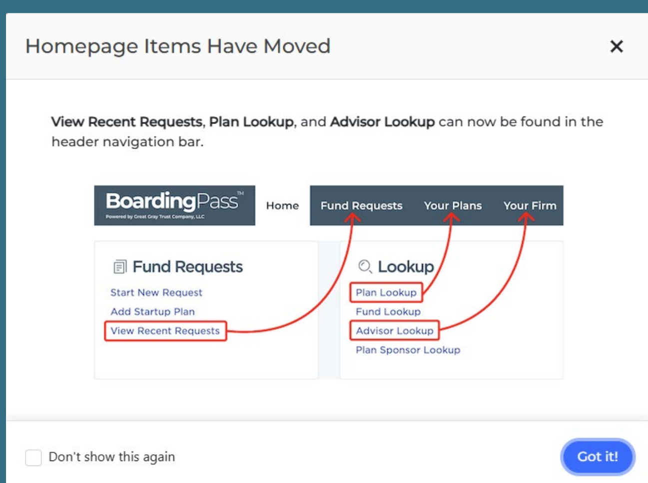
If changes need to be made after the agreement is sent, make any changes on the Fund Requests page.

In order to update the Participation Agreement sent via DocuSign, switch to the “Agreements” tab and click the “Resend” button.

A confirmation modal will display, warning that a new envelope will be sent. Click “Resend” to confirm.

If any significant changes were made to the plan, the original DocuSign envelope will be voided and a new one will be sent





Homepage Redesign

Tip for Previous Users:

We have enhanced the homepage, and it may look unfamiliar if you haven’t visited it recently.

“View Recent Requests”, “Plan Lookup”, and “Advisor Lookup” were moved into the header and are now labeled “Fund Requests”, “Your Plans”, and “Your Firm. These changes will improve your long-term experience.

WHY GREAT GRAY TRUST COMPANY?

At Great Gray we believe in - and are driven by - growth. Continually expanding and transforming retirement solutions with a mindset that reaches far beyond the status quo, starting with CITs. Bringing new efficiencies, new possibilities and new objectives to our clients. And to their clients. Always listening, learning, innovating on top of a long-standing reputation for fiduciary strength and expertise. Creating what's next - for CITs and beyond - from a critical foundation of discipline and trust. Empowering our industry, clients, and ourselves to grow confidently

Make Onboarding Your Competitive Advantage

Join the 4800+ forward-thinking advisors who signed up for BoardingPass.

If you have any questions or need assistance with any of these tasks, please contact boardingpasssupport@greatgray.com or call (866) 427-6885. Our team is here to support you through each step of the onboarding process, helping to ensure a smooth and efficient experience for you and your clients.