

PARTICIPANT PORTAL TAILORED TO YOUR NEEDS



CONTACT US TO SCHEDULE A DEMO



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INTUITIVE & USER-FRIENDLY

The California CLASS Participant Transaction portal allows your special district to easily navigate and manage account access and bank information. Participants can easily add unlimited subaccounts and transfer between subaccounts seamlessly when applicable.

TRANSPARENT REPORTING CAPABILITIES

With California CLASS, your special district will have access to monthly statements no later than the third business day of the month; historical transactions and confirmations for your auditors and bookkeeping purposes; and the ability to filter and sort reports based on criteria that is important to you.

All California CLASS reports are exportable via PDF and Excel including fund information. Additionally, your special district can run on-demand reports for custom time frames.



OPERATIONAL EFFICIENCIES

California CLASS Participants are able to schedule transactions in advance through the online transaction portal. Entering orders online for future dates ensures that you do not miss a deadline even if you are out of the office. Your special district can also opt to set reoccurring transactions for things like payroll or taxes.

You may incur fees associated with wires and/or ACH transactions by your bank, but there will be no transaction fees charged from California CLASS for such transactions. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. California CLASS is not a bank. An investment in California CLASS is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Although California CLASS Prime seeks to preserve the value of your investment at \$1.00 per share, they cannot guarantee they will do so. Please review the California CLASS Information Statement before investing. **Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.**