

Registering to Access Accounts Through Wealthscape Investor™

From the Avantax home page www.avantax.com navigate to **Login** in the upper right & click **Clients** from the dropdown menu, then click Wealthscape Investor™ link.

1. In the Sign In box, click **Register** to register your accounts for Wealthscape Investor™.

The screenshot shows the Avantax Sign In page. It includes fields for Username and Password, a 'Remember me' checkbox, and a 'Sign in' button. A 'Register' link is located below the 'Forgot Password?' link and is highlighted with a red box. A message box on the right states: 'Please review our browser support information. By signing in, you consent to the use of cookies as described in the Privacy Policy.'

2. In the Register Now box, enter the last four digits of your Social Security Number, your first and last name as it appears on the account, and your date of birth then click Next.

The screenshot shows the 'Register Now' page under the heading 'Verify Your Identity'. It contains the following fields: 'Last 4 Digits of Your SSN' (5252), 'First Name' (Wilma), 'Last Name' (Flintstone), and 'Date of Birth' (December 25, 1960). There is a 'Don't have a SSN?' link. At the bottom right, the 'Next' button is highlighted with a red box.

3. Next, enter your Brokerage account number then click Next.

The screenshot shows the 'Register Now' page with the 'Verify Your Identity' section. The 'Enter Your Account #' field contains the value 'HVT-035928'. The 'Next' button at the bottom right is highlighted with a red box.

4. On the next page, create a password using the Password Guidelines and create a security question then click **Next**. You will use this password to access your account in the future.

The screenshot shows the password creation and security question setup page. It includes a 'Create New Password' field with a 'Password Strength: Good' indicator, a 'Retype New Password' field, and 'Password Guidelines' which state: 'Your password must be 6-20 characters and include 3 of the following: Number, Special character, Capital letter, Lowercase letter'. Below this is a 'Create Your Security Question' section with a dropdown menu for the question (set to 'What is the name of your first pet?') and fields for the answer and re-enter answer.

5. You have successfully registered for Wealthscape Investor™. To continue to Wealthscape Investor™, Click Continue to home page.

The screenshot shows the 'Register Now' page with a successful registration confirmation. It displays the message: 'Your registration was successful. User ID: 4389167196'. A note below states: 'Please record your User ID for future use. You will be required to enter this User ID and your password every time you log in to your account.' At the bottom right, there is a 'Continue to home page' link.

Important! Record the User ID for future use. You will be required to enter this User ID and your password every time you log in to your account.

- Click the **Accept** button on the User Agreement, then you must confirm at least one email address and phone number. You may confirm the information used to set up the account or you can add new information. When finished, click **Continue**, then click **Submit** to enter your selections.

Security Enhancements

For security purposes, your phone number and email address are now required for your access to this site. You will not be able to access the site until you have confirmed at least one email address and at least one phone number.

This information will be used only for this particular site but will not update your account profile information.

All fields are required unless otherwise noted.

Primary Email: WILMAFLINTSTONE@AOL.COM

Add alternate email

Phone Type: Mobile (Selected), Domestic (Selected), International

Primary Phone: Enter New Phone, 001, 555-555-5555

Add alternate phone

Continue

- You will receive a Go Paperless offer. Click **Enroll Now** to begin.

Go Paperless

Enroll in electronic delivery for all of your accounts. It helps you save time and paper.

We'll send you an e-mail alert when your financial documents (e.g., statements and confirms) are available to view online.

Enroll now - you'll be glad you did.

No Thanks **Enroll Now**

- In the Document Delivery Instructions window, select your account number then click the Set all documents to electronic delivery box. When finished, click **Save This Account**.

Important! If you have multiple accounts, you must select each account separately and elect electronic delivery. Spouses and other household members must also register separately.

Document Delivery Instructions *Indicates required field. ?

Rather than sending paper-based mail, we will send you an email alert when your financial documents are available to view online.

Select and save each account separately

Individual (I) - HVT-035928 Not Enrolled

Email Address* WILMAFLINTSTONE@AOL.COM Edit Email

| Document Delivery Instructions | <input checked="" type="checkbox"/> Set all documents to electronic delivery |
|--|--|
| Confirms/Confirming Prospectuses | <input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail |
| Statements & Regulatory Inserts | <input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail |
| Shareholder Reports (including Prospectuses) & Other Documents | <input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail |
| Tax Forms & Related Disclosures | <input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail |
| Quarterly Performance Reports | <input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail |

Selecting either option above will still allow you to access your documents online.

Close **Save This Account**

- Once you've agreed to the Electronic Delivery Agreement, your document delivery instructions have been saved for the account. You can then make an election on another account or close the window.

How to Change your Wealthscape Investor™ Username:

- Once logged into Wealthscape, select **User Options** and **Change Username** from the dropdown menu.
- A new dialogue box appears. Create a new username with the stated guidelines. Complete the **Enter New Username** field, and **Check Availability** by clicking the respective button.
- Once the new username is determined, scroll down to enter the **Current Password** to authorize the change, and click **Next**.

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