

Overview

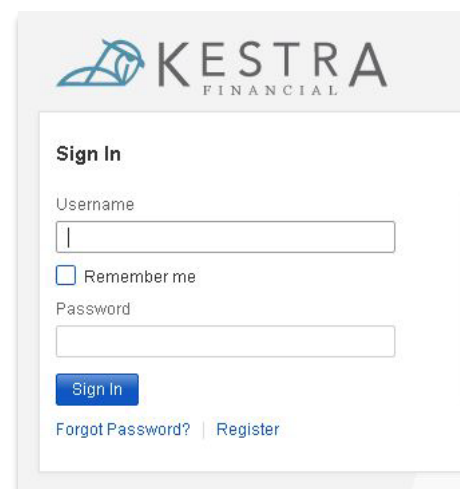
By enrolling in Wealthscape Investor Online, you get 24/7 access to your account information. In addition, you can stay connected to your brokerage account on your mobile device or iPad® with the convenient mobile app, giving you access virtually any time you need it.

Supported Mobile Devices

- iPhone® 5s+ and iPad Air®+ running Apple iOS 11+
- Android® Phones running Android OS 5.x+

Easy Steps to Access Your Brokerage Account Online

- Visit www.wealthscapeinvestor.com/kestra (It is important that you do not attempt to access your accounts directly through wealthscapeinvestor.com, as this will give you an error message. The Kestra logo displayed on the login page confirms that you are attempting to log into the correct portal)
- Click the *Register* link
- Enter the last four digits of your Social Security number, first name, last name, and date of birth
- Enter your valid brokerage account number, which can be found on a recent brokerage account statement or confirm
- Once your identity has been verified, your User ID will be displayed on your confirmation page
- You'll be prompted to establish and confirm your personal identification number (PIN), and create your security questions



The screenshot shows the Kestra Financial Sign In page. It features the Kestra Financial logo at the top. Below the logo, the text "Sign In" is displayed. There are two input fields: "Username" and "Password". A "Remember me" checkbox is located between the two fields. A blue "Sign In" button is positioned below the password field. At the bottom of the form, there are two links: "Forgot Password?" and "Register".

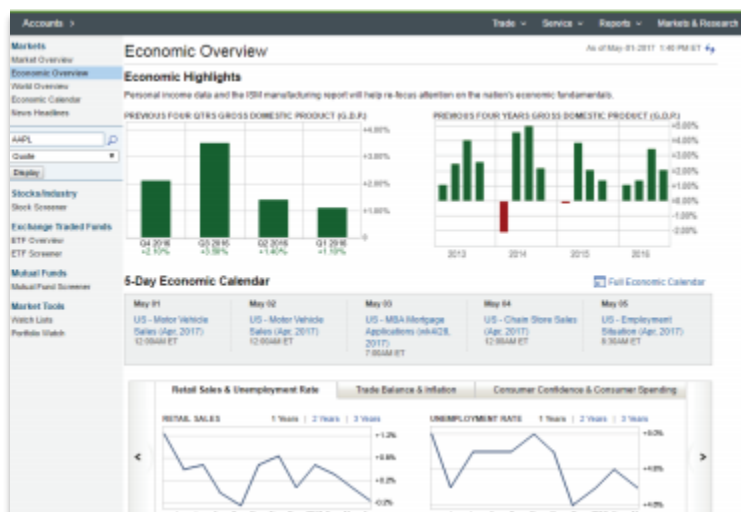
Quick Access to Your Account Information

- Access to your accounts, positions, and balances
- A customizable positions and history page enables you to customize your screens, so you can view the data that's most important to you
- Sort and filter your holdings with a click of your mouse
- Get real-time order status updates and two years of transaction history



The screenshot displays the "Account Positions" page in the Wealthscape Investor Online interface. The page shows a table of account positions with columns for "Security", "Quantity", "Market Price", and "Market Value". The total market value is displayed as \$6,258,180.21. The table lists various securities, including individual stocks and mutual funds, with their respective quantities and market values.

Security	Quantity	Market Price	Market Value
Individual Stocks	100,000	\$100.00	\$10,000.00
Mutual Funds	1,000,000	\$10.00	\$10,000.00
Options	1,000,000	\$10.00	\$10,000.00
Bonds	1,000,000	\$10.00	\$10,000.00
Commodities	1,000,000	\$10.00	\$10,000.00
Real Estate	1,000,000	\$10.00	\$10,000.00
Art	1,000,000	\$10.00	\$10,000.00
Collectibles	1,000,000	\$10.00	\$10,000.00
Private Equity	1,000,000	\$10.00	\$10,000.00
Other	1,000,000	\$10.00	\$10,000.00



Robust Market Data and Research Tools

You'll have access to a broad range of information you can use to track your portfolio and gain insight into market events, including the following:

- Dynamic charts and analytics
- Powerful investment screeners
- Detailed investment profile reports
- Comprehensive company profiles and fundamentals
- Interactive work overview perspective with drill-down exchange data by country
- Economic overview with one-click access to a five-day economic calendar

Access Key Documents

With your online brokerage account, you will always have access to your account history, including the following:

- 10 years of statements
- Seven years of trade confirmations
- Up to seven years of tax documents*
- Three years of customer correspondence

Go Paperless with eDelivery and eNotification

Once you have enrolled in Wealthscape Investor Online, you can simplify your recordkeeping by signing up for eDelivery. You'll get electronic storage of statements, trade confirmations, prospectuses, shareholder reports, and other eligible correspondence. To sign up for eDelivery:

- Log in to you online account
- Click *Go Paperless*

With eNotification, you will receive an email letting you know whenever a new document is available for viewing

Stay Connected with Wealthscape Investor™ Brokerage Mobile App

Tap into your online brokerage account when you're on the go. You can view your positions, balances, and transaction history from your iPad®, iPhone®, and Android™ phone.



Wealthscape Investor Online



**Two years of tax documents currently available; over time, availability will increase to seven years of documents.*

To enroll in online brokerage, please contact your broker or advisor.

Use of the Wealthscape InvestorSM Brokerage Mobile app requires an active online brokerage account.

This information is as of May 2019, is subject to change, and is revised periodically. Companies and trading symbols mentioned are provided for illustrative purposes and should not be used or construed as an offer to sell, a solicitation of an offer to buy, or a recommendation for any security.

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ACR#276941