



INTRODUCTION TO OSAIC AND CLIENT ACCESS REVIEW

FOR OSAIC ACCOUNTS

2025

Agenda

INTRODUCTION TO OSAIC
EQUIPT ACCESS
ONE VIEW ACCESS
CLOSING/QUESTIONS





INTRODUCTION

OSAIC

We have moved from the largest Broker/Dealer Firm to the Largest Wealth Management Firm, OSAIC.

By doing this we will be able to provide a more individualized and detailed approach to managing your accounts and working together to protect, manage, and grow your future vision of life!

What does this mean for you?

ACCESSING YOUR ACCOUNT INFORMATION

EQUIPT

- equipt.osaic.com
- Webpage
- Android/IOS App (Osaic eQuipt)
- Brokerage Accounts
- Need Account Number for Set Up

ONEVIEW

- Webpage
- Comprehensive to include outside accounts (Annuities, 529, Mutual Funds, etc.)
- Need an Email Invite

Access through Daniel Wealth Management Website

Your Custom Account Portal

- View online at equipt.osaic.com
- Download the Osaic Equipt mobile app on your iOS or Android device.

The logo for eQuipt GUIDE. The word "eQuipt" is in a teal, sans-serif font with a registered trademark symbol (®) to its upper right. Below it, the word "GUIDE" is in a bold, black, sans-serif font. The background of the logo area is white with a large, light teal abstract shape that curves around the text.

eQuipt®
GUIDE

Click don't have an account? Sign up!

What will you need?

- ▶ DOB
- ▶ Social Security Number
- ▶ Zip Code
- ▶ Osaic account number

osaic eQuipt

Login
Enter your eQuipt credentials

Username [Forgot Username?](#)

Password [Forgot Password?](#)

Login

Don't have an account? [Sign Up ->](#)

What You Will Need

Securities and investment advisory services are offered through the firms: Osaic Wealth, Inc., Trad Advisors, LLC, Oak Institutions, Inc., and Woodbury Financial Services, Inc. Broker-dealers, registered investment advisers, and members of FINRA and SIPC. Securities are offered through Securities America, Inc., American Portfolio Financial Services, Inc., and Lazard Frères & Co., broker-dealers and member of FINRA and SIPC. Advisory services are offered through Osaic Financial Advisors, LLC, American Portfolio Advisors, Inc., Lazard Frères & Co. Management, Inc., Securities America Advisors, Inc., and Trad Capital Advisors, LLC. Registered investment advisers. Advisory programs offered by Osaic Wealth, Inc., Securities America Advisors, Inc., Trad Advisors, LLC, and Woodbury Financial Services, Inc., are sponsored by WISCONSIN Wealth Management Corp., an affiliated registered investment advisor.

Empowering you to thrive

Welcome to Osaic!

Our mission is to ensure affiliated financial professionals have the solutions, support and flexibility they need to make a difference in their clients' lives — because we know that when they thrive, their clients do too.

Mobile

Mobile

Send Passcode Via Text

Call Me With My Passcode

Don't see your correct number? Call customer service at 855-412-3666 to update your phone number(s).

Security Process

- Select the number where you want to receive the security code.
- Select send passcode via text or call me with my password.

We Just Texted You

Please enter the passcode we just sent to (***) - *** - 6666

123456

Verify Passcode

Didn't receive it? [Request a new Onetime Passcode](#)

[Call Me With My Passcode](#)

[Use A Different Phone Number](#)

Review for Accuracy

- Phone number
- Email
- Add any new entries needed
- If everything looks right click “Everything Looks Right” at the bottom of the page.

eQuipt

01 VERIFY YOUR ACCOUNT 02 AUTHENTICATE YOUR IDENTITY **03 CONTACT INFORMATION** 04 REGISTER

Is This Information Still Accurate?

We understand that this information can change from time to time. Since we will be using it to validate your identity, please ensure it is accurate. If anything looks incorrect, please update it at this time.

Phone Numbers

Mobile Phone Number Primary ?

(444) 555 - 6666 🗑️ 🔵

Verified Phone Number - Mobile ?

(555) 666 - 7777 ●

Home Phone Number

Add Home Phone Number 🗑️ ●

Business Phone Number

Add Business Phone Number 🗑️ ●

Email

You must have at least one email address on file

Type Primary ?

james@smith.com Personal 🗑️ 🔵

Type

Add Email Select Type 🗑️ ●


Everything Looks Right!

Register


Lastly, please create your login credentials

Create Username

Create Password

Confirm Password

By clicking here I agree to the Terms and Conditions for use of this website and I affirmatively consent to electronic delivery of any communications or documents to the email provided by me for this account 

Next

Register

- Create your username
- Create a password
- Confirm your password
- Check I agree to the terms described
- Add equipt.osaic.com to your browser's favorite list

ASSET SUMMARY



BAR



CIRCLE



Total Market Value

28,698.78

as of prior day

ASSET CLASS

MARKET VALUE

PERCENTAGE



Mutual Funds

13,891.32

47.77%

ACCOUNT DETAILS

REGISTRATION

ACCOUNT

IRA Rollover

IRA FBO John Clark

Traditional IRA

IRA FBO John Clark

Minor

John Clark Custodian

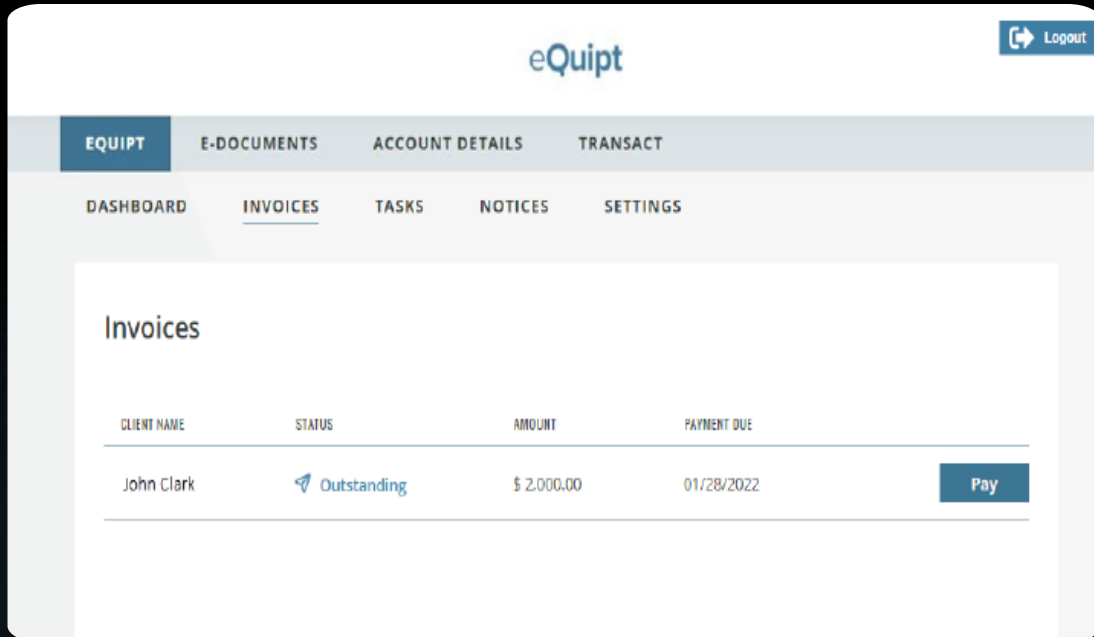
Individual

Linking Household Accounts

The screenshot shows the eQuipt user interface. At the top, there is a navigation bar with tabs: EQUIPT (highlighted with a red circle 1), E-DOCUMENTS, ACCOUNT DETAILS, and TRANSACTIONS. Below this is a secondary navigation bar with options: DASHBOARD, INVOICES, TASKS, NOTICES, and SETTINGS (highlighted with a red circle 2). The main content area is titled 'HOUSEHOLD ACCOUNTS' (highlighted with a red circle 3). On the left, there is a sidebar menu with options: ACCOUNT DETAILS, SECURITY DETAILS, HOUSEHOLD ACCOUNTS (selected), and E-DELIVERY PREFERENCES. The main content area displays a table of household accounts. The first row is titled 'Household Accounts (1)' and contains one entry for Jane Clark, 123 Main Street, with account # SUP000005, Individual, and a trashcan icon (highlighted with a red circle 5). The second row is titled 'Personal Accounts (4)' and contains four entries: IRA FBO John Clark (Pershing LLC as Custodian, IRA Rollover, account # SUP000006), IRA FBO John Clark (Pershing LLC as Custodian, Traditional IRA, account # SUP000007), John Clark Custodian (FBO Clark Clark UTMA/NJ, Minor, account # SUP000008), and John Clark (123 Main Street, Individual, account # SUP000009). A 'Link Another Account' button with a right arrow is located at the top right of the main content area (highlighted with a red circle 4).

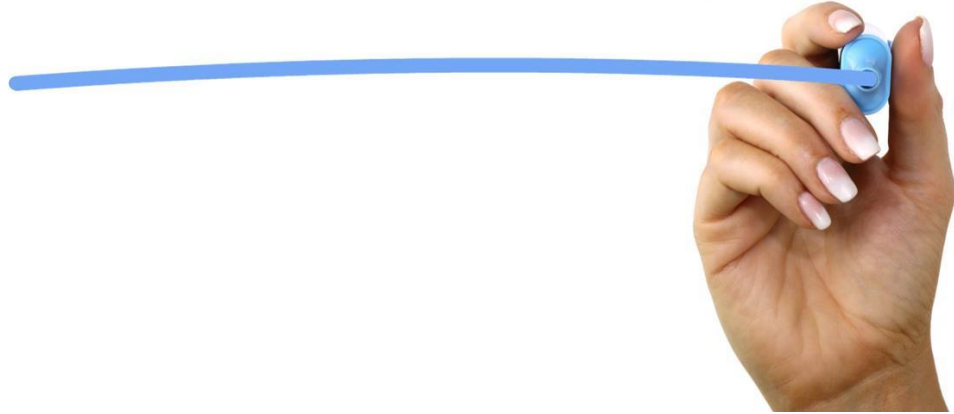
- Click the equipt tab
- Select Settings
- Select Household accounts
- Click Link Another account (you will need the account number, last 4 of your social, dob, & zip code)
- Click link button
- If you need to unlink an account, click its trashcan icon.

View/Pay Financial Planning Invoice



If you receive financial planning or consulting services billed to you, you will have an invoice tab available within the eQuipt tab. Use the invoices tab and follow the onscreen prompts to easily pay via bank account or credit/debit card.

QUESTIONS



For any questions after today's presentation
reach out to.....

Maria Barboza 803-919-0771

Stephanie Disher 803-565-9508



Donnie Daniel



Drew Miller



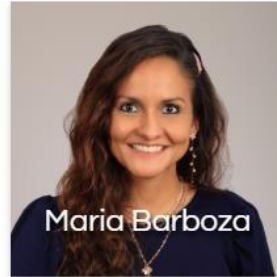
Kelly Foy



Celeste Baker



Eric Lisenby



Maria Barboza



Stephanie Disher



**Thank you
for your
attendance
today!**