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

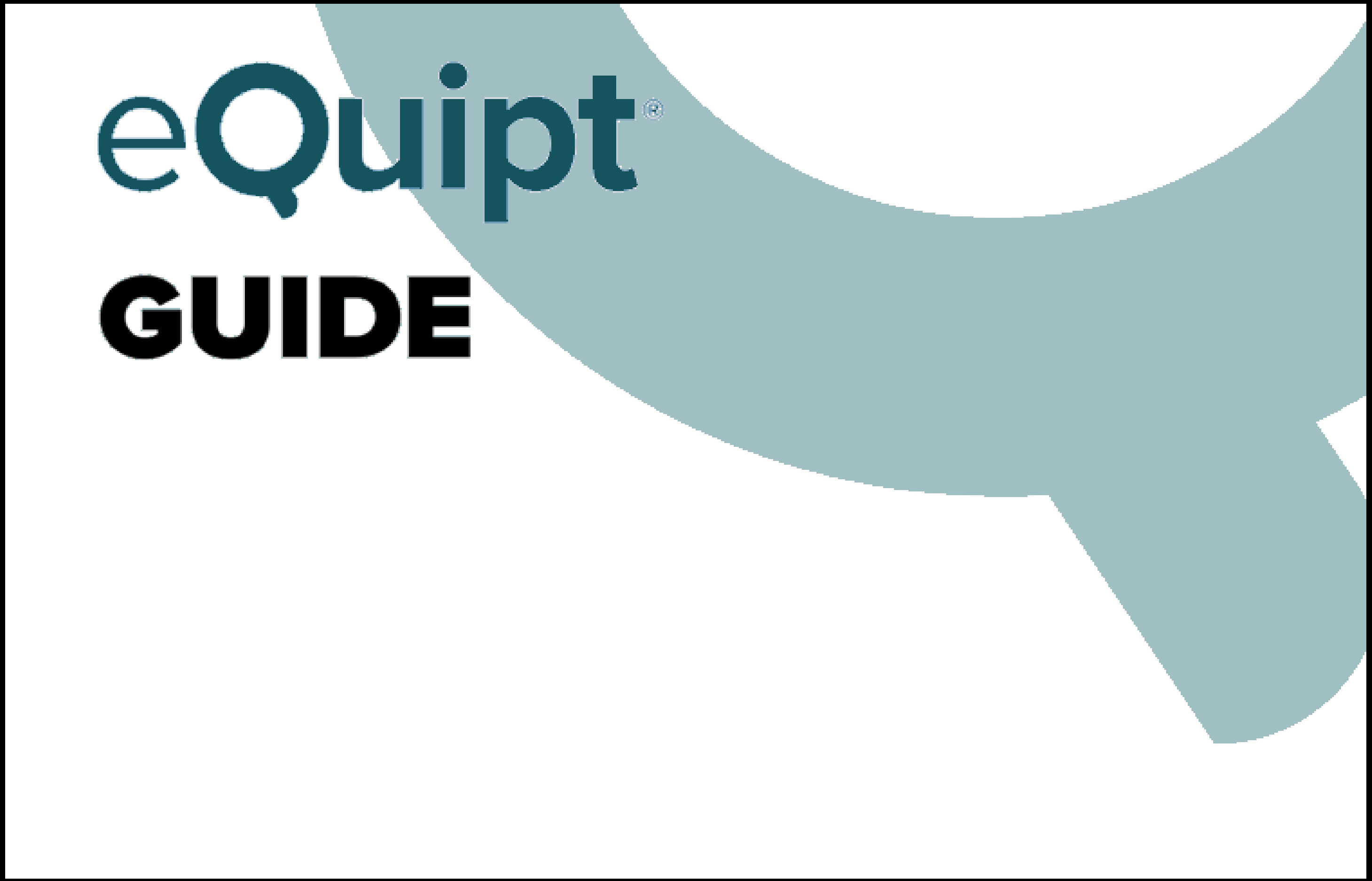
EQUIPT
- equipt.osaic.com
- Webpage
- Android/IOS App (Osaic eQuipt)
- Brokerage Accounts
- Need Account Number for Set Up

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

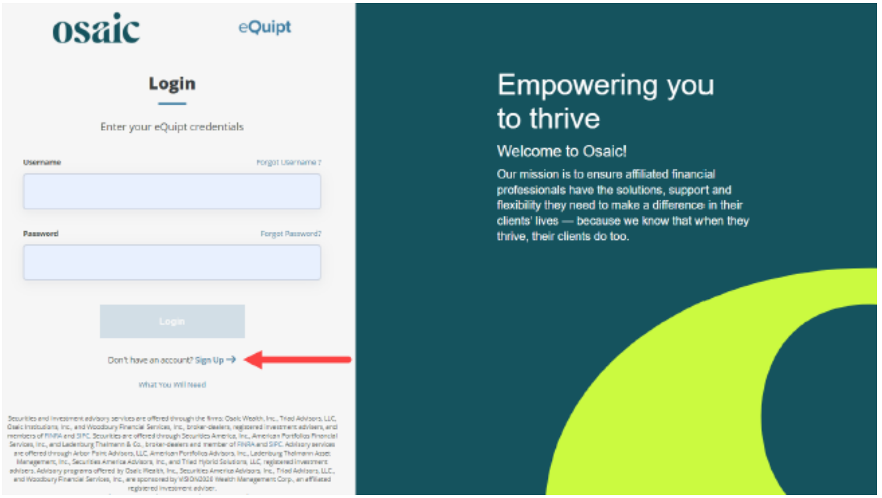
- View online at equipt.osaic.com
- Download the Osaic Equipt mobile app on your iOS or Android device.

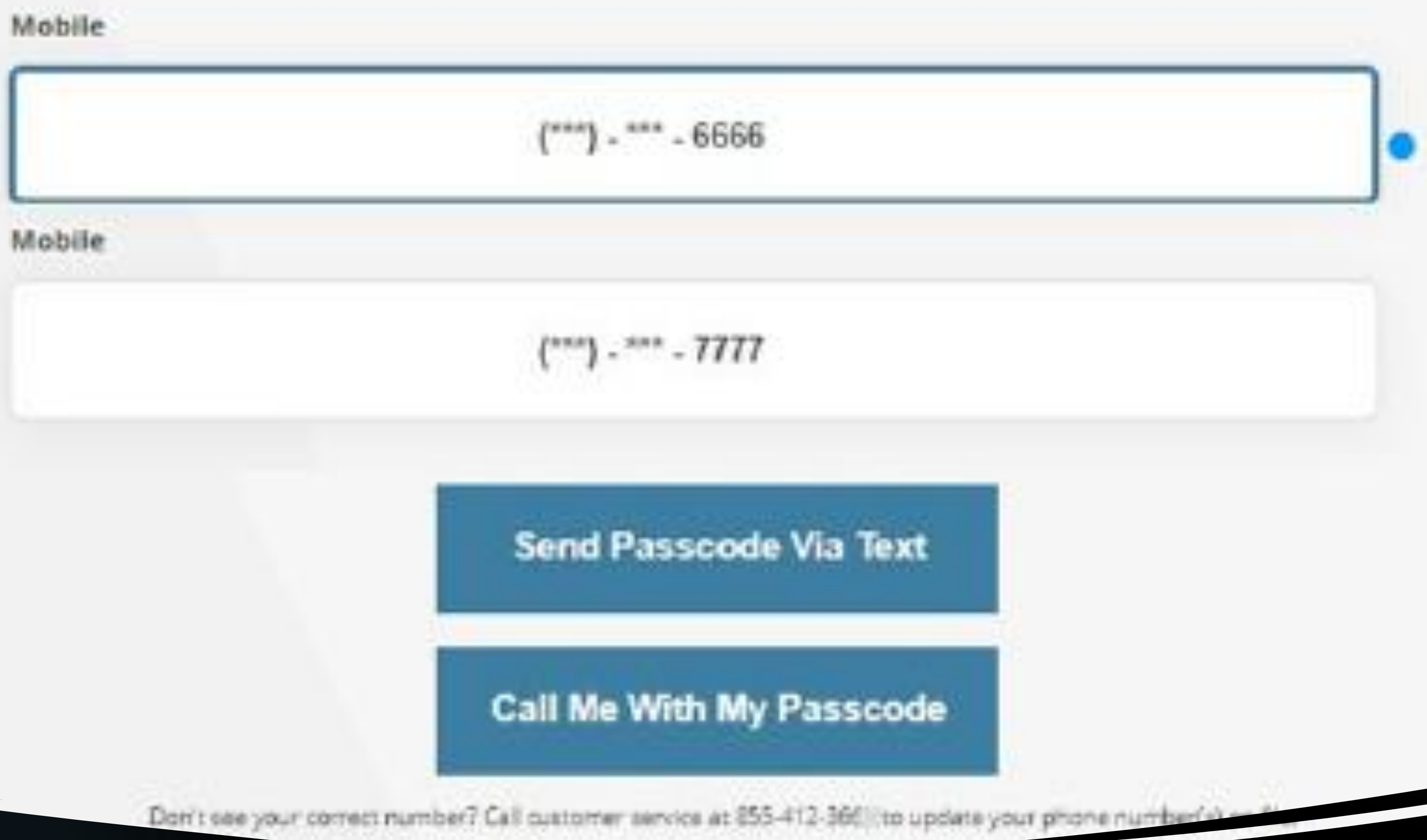


Click don't have an account? Sign up!

What will you need?

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





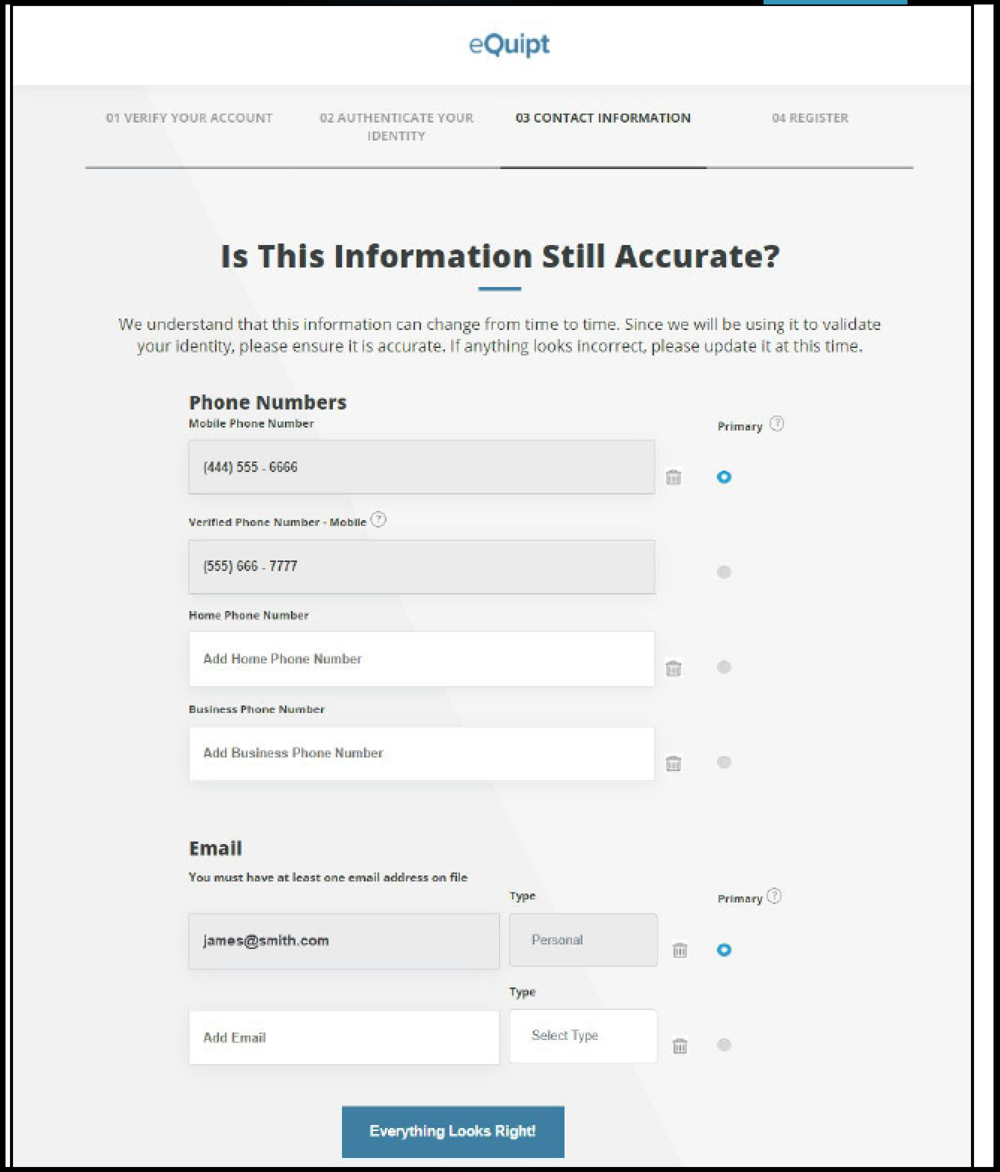
Security Process

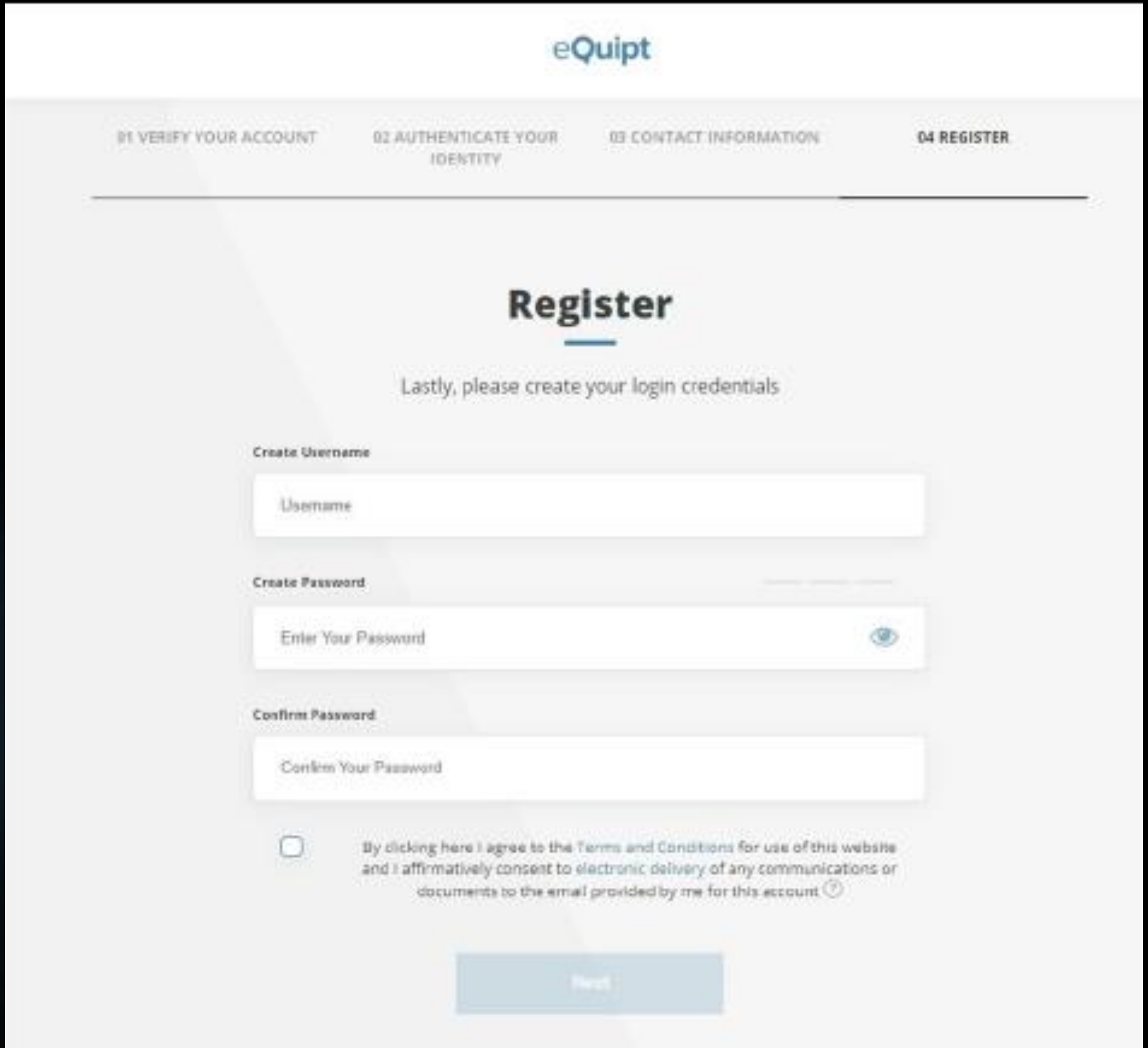
- Select the number where you want to receive the security code.
- Select send passcode via text or call me with my password.


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

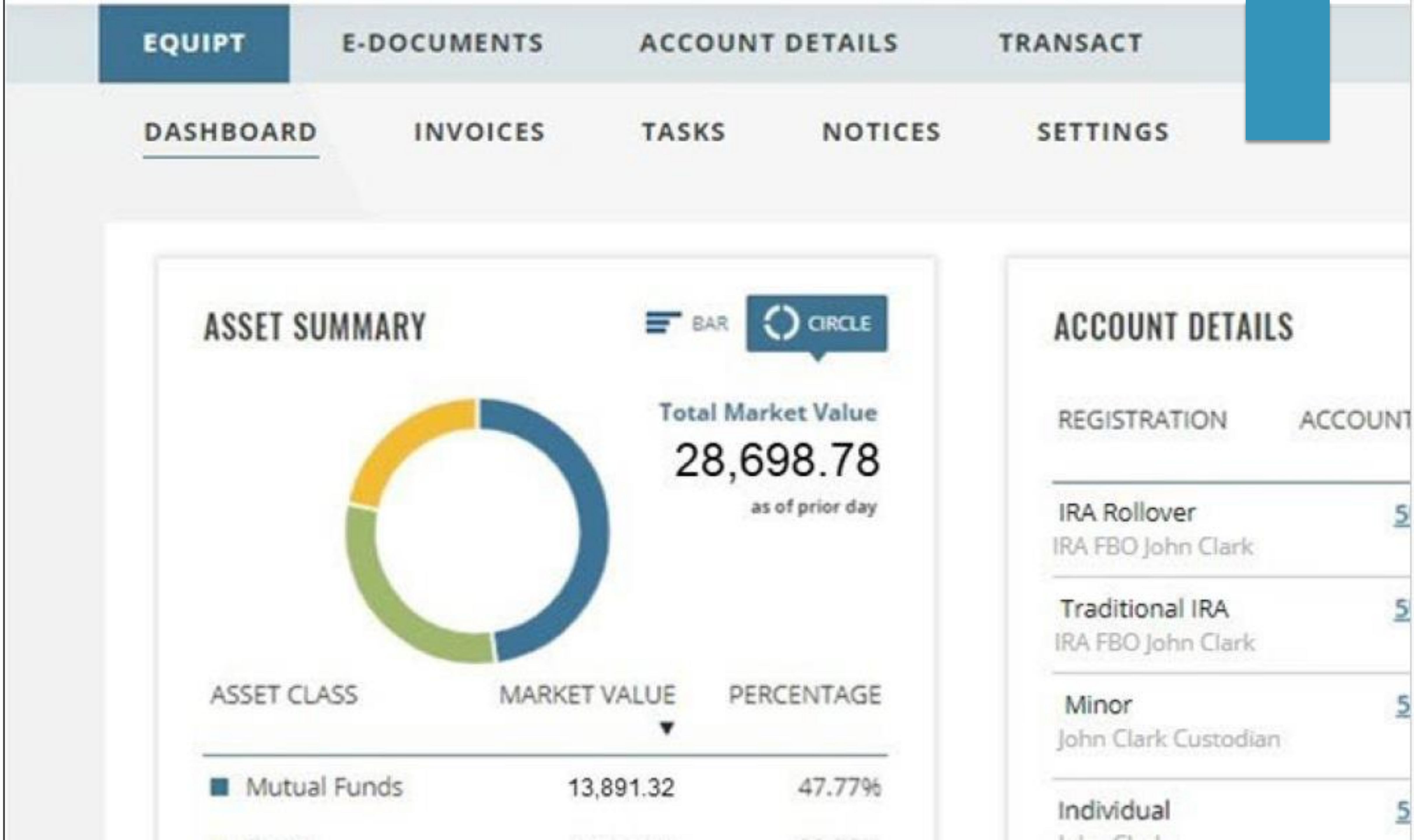
- Phone number
- Email
- Add any new entries needed
- If everything looks right click "Everything Looks Right" at the bottom of the page.

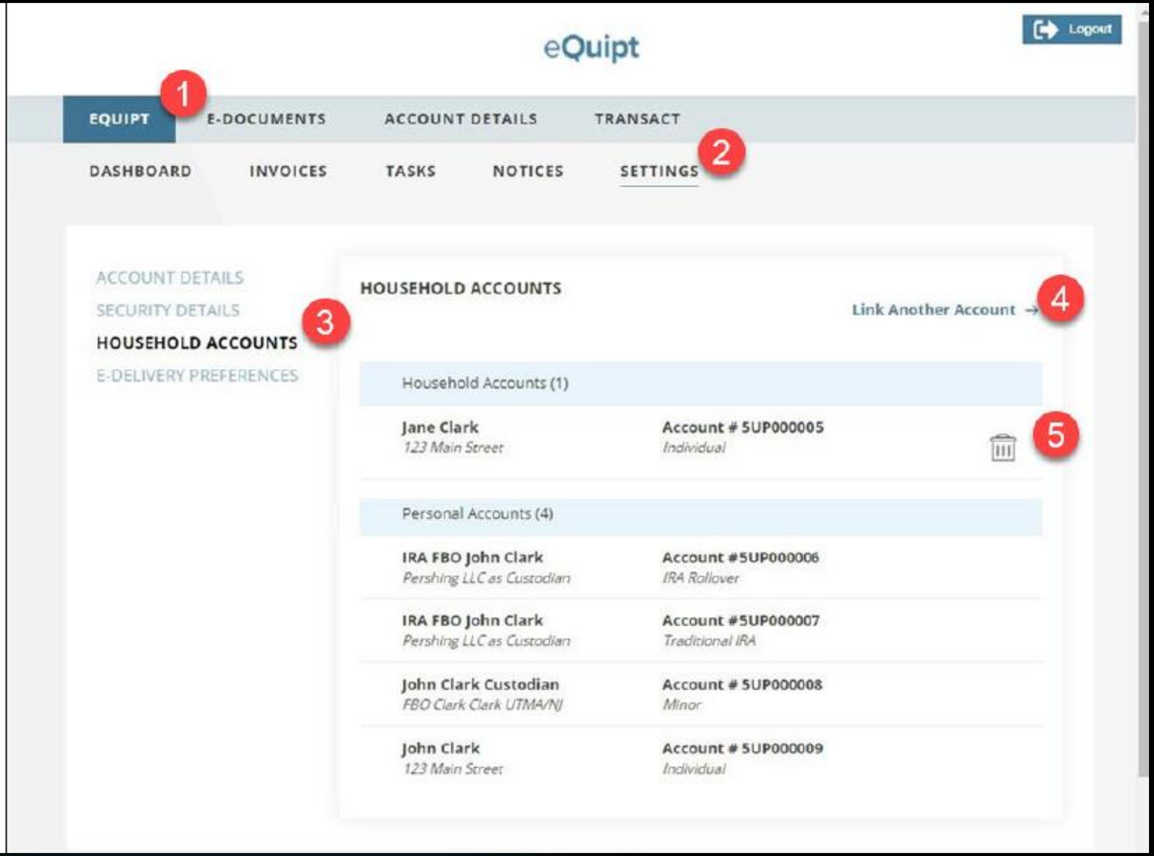




Register

- 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

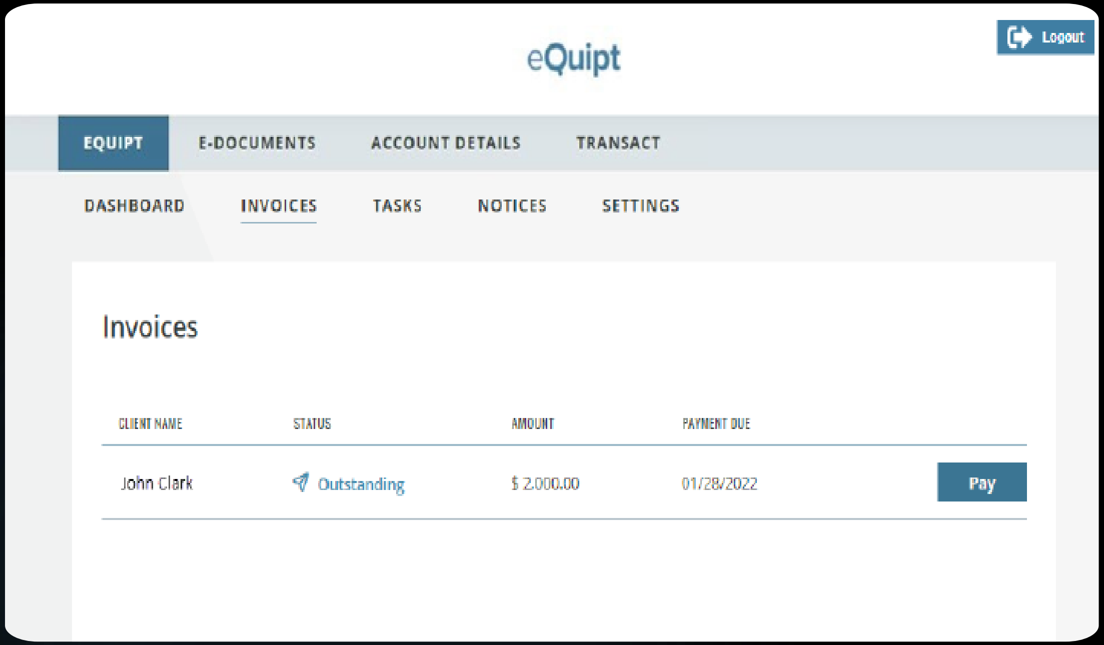

EQUIPT
E-DOCUMENTS
ACCOUNT DETAILS
TRANSACT
DASHBOARD
INVOICES
TASKS
NOTICES
SETTINGS
ASSET SUMMARY
BAR
CIRCLE
Total Market Value
28,698.78
as of prior day
ASSET CLASS
MARKET VALUE
PERCENTAGE
Mutual Funds
13,891.32
47.77%
ACCOUNT DETAILS
REGISTRATION
IRA Rollover
IRA FBO John Clark
Traditional IRA
IRA FBO John Clark
Minor
John Clark Custodian
Individual



Linking Household Accounts

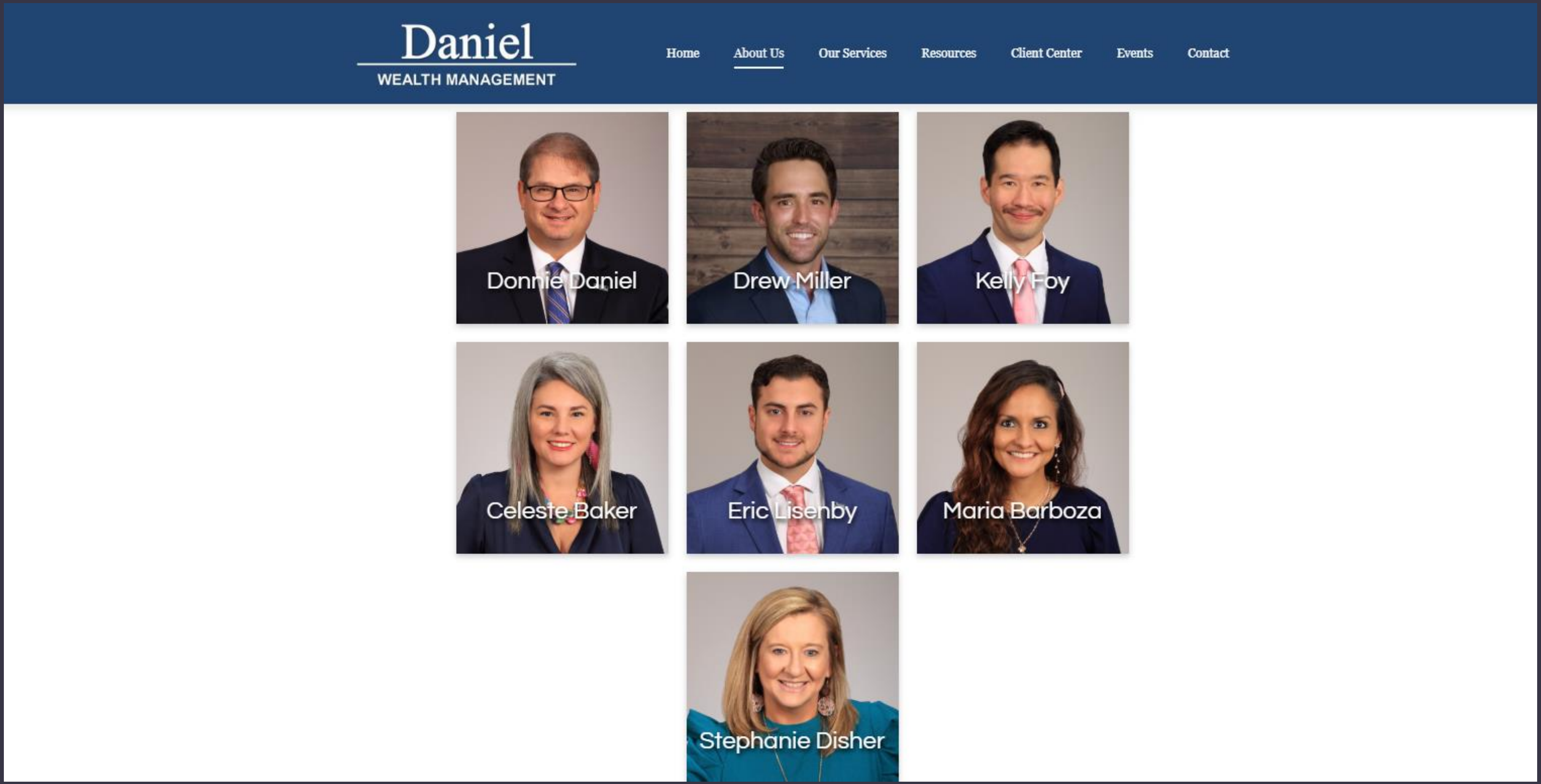
- Click the equipt tab
- Select Settings
- Select Household accounts
- Click Link Another account (you will need the account number, last 4 of your social, dob, & zip code)
- Click link button
- If you need to unlink an account, click its trashcan icon.

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.

For any questions after today's presentation reach out to……..
Maria Barboza 803-919-0771
Stephanie Disher 803-565-9508


Daniel
WEALTH MANAGEMENT
Home
About Us
Our Services
Resources
Client Center
Events
Contact
Donnie Daniel
Drew Miller
Kelly Foy
Celeste Baker
Eric Lisenby
Maria Barboza
Stephanie Disher

Thank you for your attendance today!