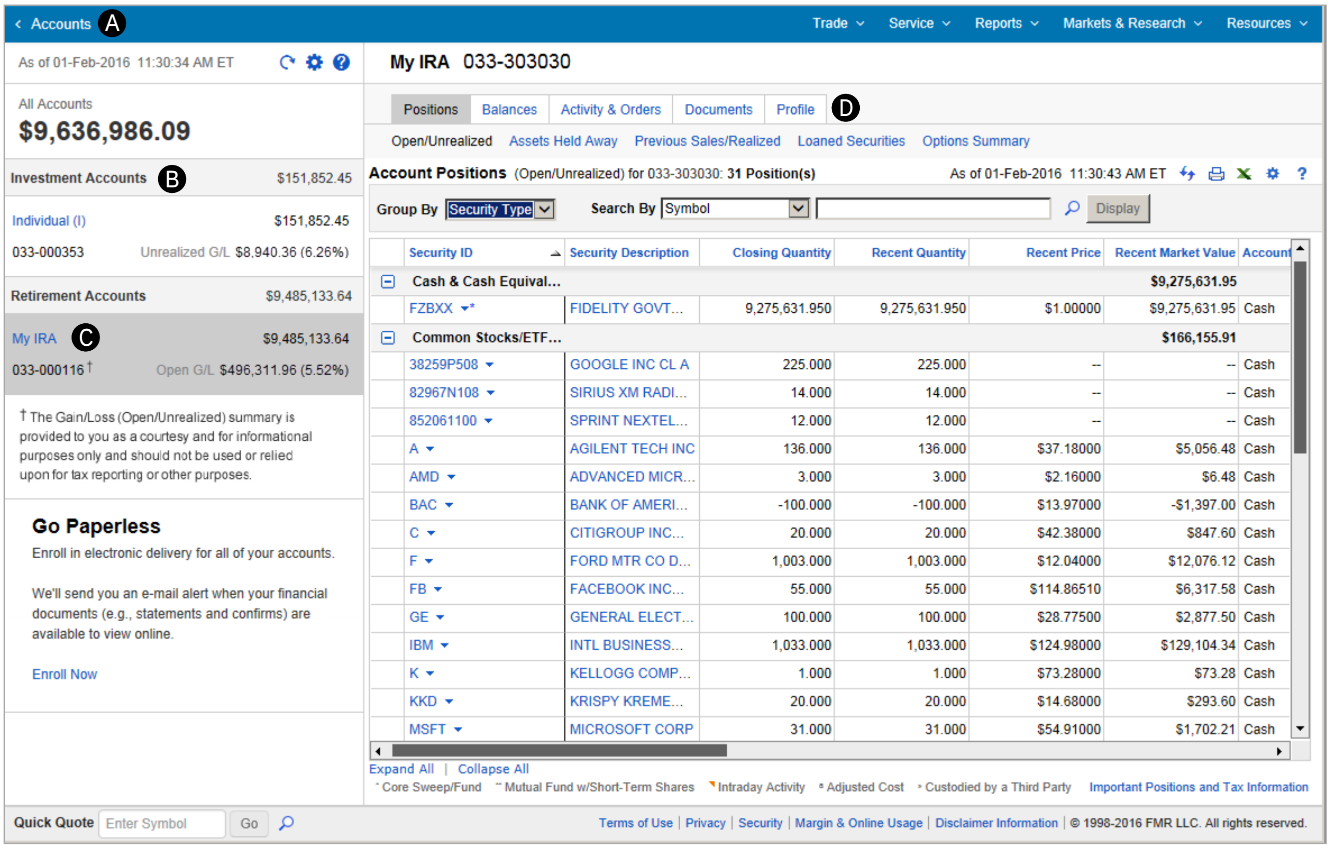
+ Feedback

Wealthscape Investor℠: Accounts Panel & Menu Bar

Accounts Panel: Select an Account

When an account holder first logs into Wealthscape Investor℠ (or your firm's customer brokerage site), the Accounts Panel to the left of the application window provides a persistent view of the account holder's investment portfolio. This view includes individual account values and the total value for all accounts.

Users should begin by using the Accounts Panel to select an account. Navigation is possible with just a single click.



A	If not already open, select **Accounts** to show the Accounts Panel. Select **Accounts** again to hide the panel and expand the available window area to the right of the panel.
B	Up to 50 accounts can list in the panel for the user ID. Accounts are organized in sections: **Investment Accounts** and **Retirement Accounts**. These sections display only if accounts of that type are associated with the user ID. Less common sections may display, if applicable: **Insurance & Annuities** and **Other Assets Held Away**.
C	Select an account. Positions for that account display in the area to the right of the panel, by default. If the user assigned names to the accounts, those account names display in the Accounts Panel, such as **My IRA**. If the user did not assign names, the account registration types display instead, such as **Individual (I)**.
D	Select tabs to navigate to other account-related windows, such as **Balances** or **Activity & Orders**, for the currently selected account. Links enable you to drill down to further account detail, such as **Options Summary**.

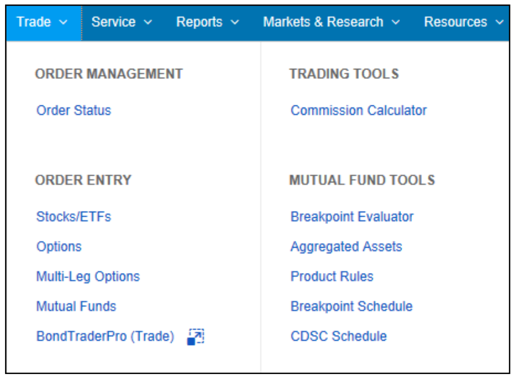
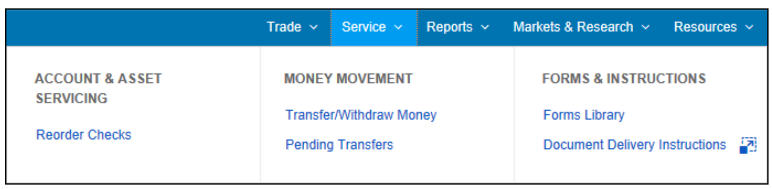
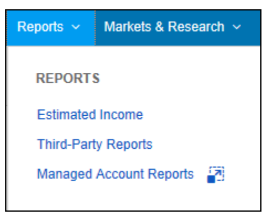
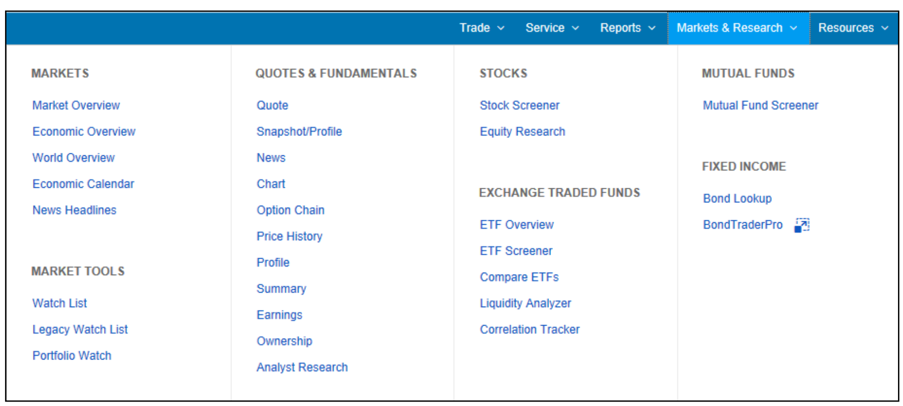
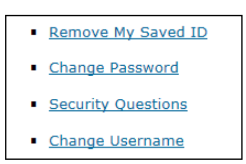
For investment professional use only. Screens shown are for illustration purposes only.
Not authorized for distribution to the public in any form including distribution as sales material.
The registered trademarks and service marks appearing herein are the property of FMR LLC.
Fidelity Clearing & Custody Solutions provides clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC.
200 Seaport Boulevard, Boston, MA 02210
1.9869036.102 750877.3.0

+ Feedback

Menu Bar: Navigate to Other Windows

After an account is selected and in context, use the menu bar above the window area to access order entry tickets, money movement capabilities, reporting features, research tools, etc.

Important: *Menus and menu options that display are limited to those to which a user ID is entitled.*

<table>
<tr><th>Menu</th><th>Menu Options</th></tr>
<tr><td>Trade
Find order-related windows, including order management (Order Status), order entry tickets, trading tools (Commission Calculator), and mutual fund tools.</td><td>
</td></tr>
<tr><td>Service
Sign up for e-mail notification when account documents are available online (Document Delivery Instructions) or to transfer or withdraw money.</td><td>
</td></tr>
<tr><td>Reports
Access reports, including estimates of future monthly cash flows in one or more accounts for the next 12 months (Estimated Income).</td><td>
</td></tr>
<tr><td>Markets & Research
Explore tools that enable you to retrieve the latest market quote (Quote) or a comprehensive market overview (Market Overview).
NOTE
Quotes may be delayed at least 15 minutes depending on the market package elected by your firm.</td><td>
</td></tr>
<tr><td>User Settings
Select Settings above the menu bar to display these options and more, which include changing your username and/or password.</td><td>
</td></tr>
</table>