

osaic

Login instructions for OneView

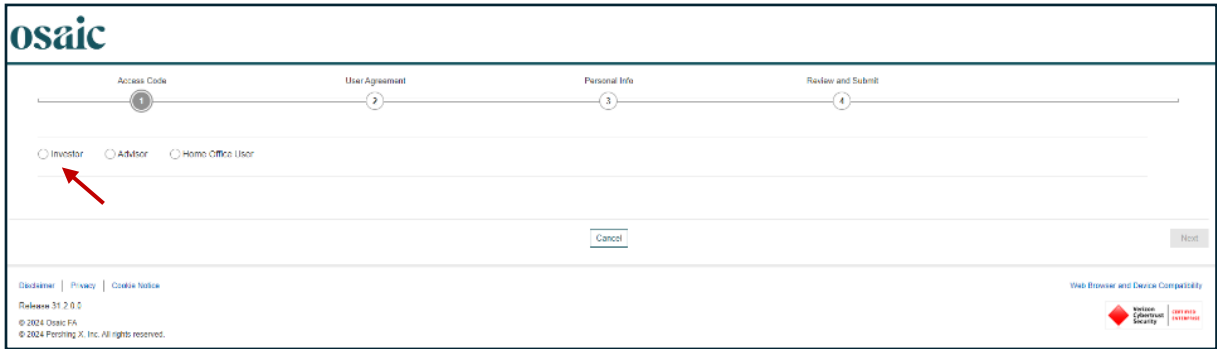
Reach out to your financial planner to request an invitation link.

You will receive an email with the verbiage below.

Dear _____,

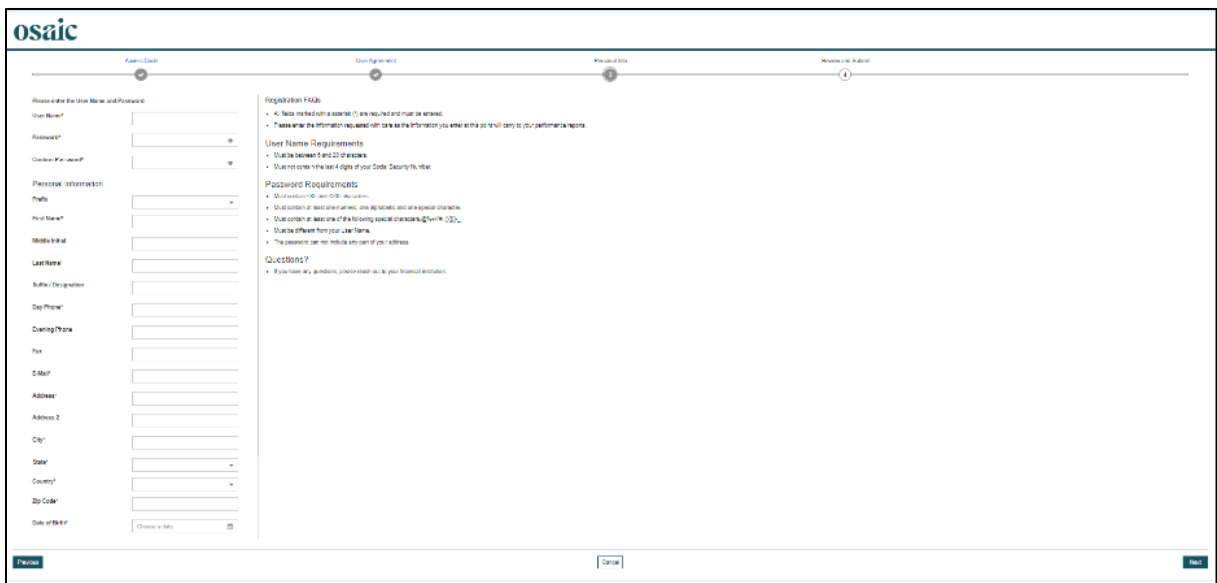
Your advisor has invited you to access Wealth Reporting and Insights (WRI). Please click the link below to accept the invitation. If the URL does not work, please copy and paste it into your browser. You will be required to register, create an account, and complete the initial setup as instructed below. Please note that you will be prompted for an access code, which will be sent in a separate email. **1.** After you click the URL, choose the 'Investor' option. **2.** Enter your SSN/TIN and access code. **3.** Follow the on-screen prompts to complete the User Agreement and Personal Information sections. Thank You.

1. and 2.



The screenshot shows the osaic registration interface. At the top, the osaic logo is displayed. Below it, a progress bar shows four steps: 1. Access Code, 2. User Agreement, 3. Personal Info, and 4. Review and Submit. Step 1 is currently active. Underneath the progress bar, there are three radio button options: Investor, Advisor, and Home Office User. A red arrow points to the 'Investor' option. At the bottom of the form, there are 'Cancel' and 'Next' buttons. The footer contains links for 'Disclaimer', 'Privacy', and 'Cookie Notice', along with copyright information for 2024 Osaic FA and Pershing X, Inc.

3.



The screenshot shows the osaic registration interface at the 'Personal Info' step. The progress bar shows steps 1 through 4, with step 3 being the current active step. The 'Personal Information' section is expanded, showing various input fields: User Name*, Password*, Gender* (Male/Female), First Name*, Middle Initial, Last Name, Suffix (Designation), Day Phone*, Evening Phone, Fax, E-Mail*, Address, Address 2, City*, State*, Country*, Zip Code*, and Date of Birth*. To the right of these fields, there are sections for 'Registration FAQs', 'User Name Requirements', 'Password Requirements', and 'Questions?'. At the bottom of the form, there are 'Previous', 'Cancel', and 'Next' buttons.

Review the information you entered. Select Submit and the process is complete.

<https://oneview.v2020-sai.com/> is the URL you will use to log into your account.