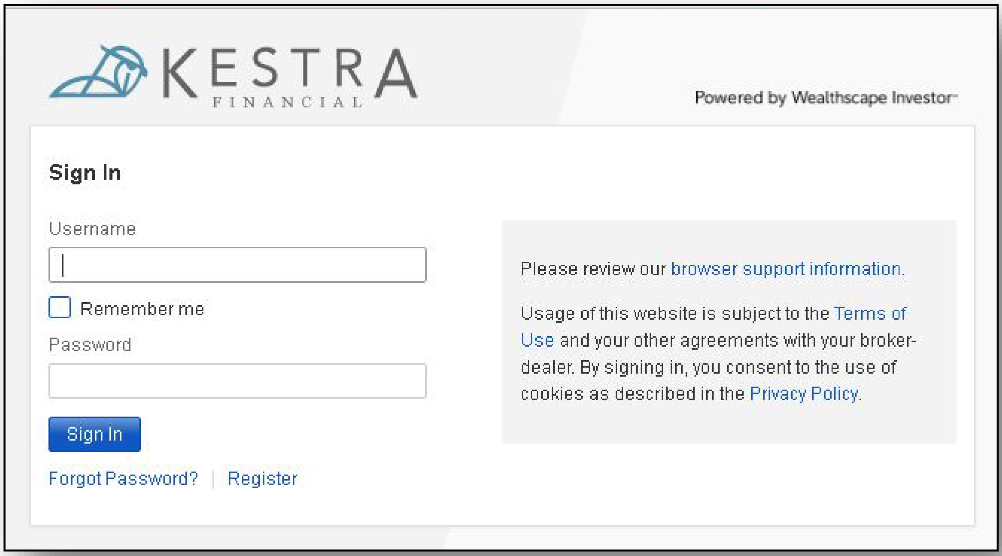
Wealthscape Investor Navigation

Logging In

Once you have your Wealthscape Investor user ID and PIN, you can log in using the website address **www.wealthscapeinvestor.com/kestra.**

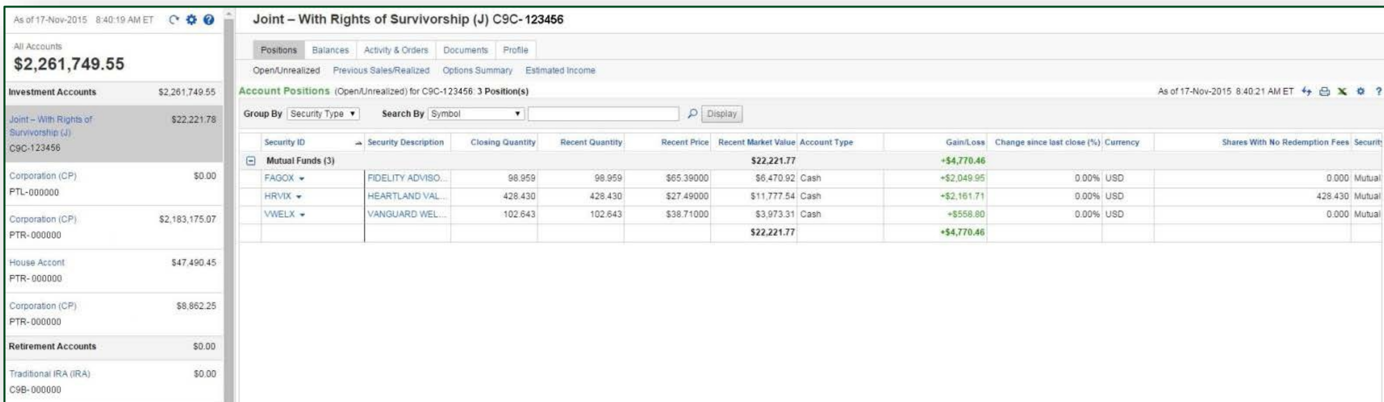
It is important that you do not attempt to access your accounts directly through wealthscapeinvestor.com, as this will give you an error messages. The Kestra logo displayed on the login page confirms that you are attempting to log into the correct portal.



Once you're logged in, using your User IDs and PINs, you'll have access to all accounts linked to their IDs as well as the opportunity to further customize the online experiences.

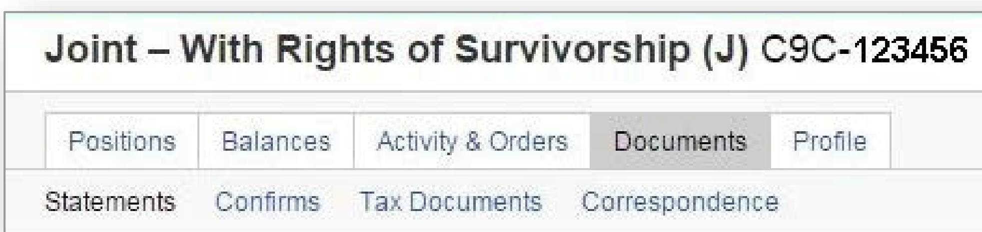
Viewing Account Information

From the Accounts Tab in the upper left corner, you can view a summary of all accounts or choose an account to view specific information.



Documents

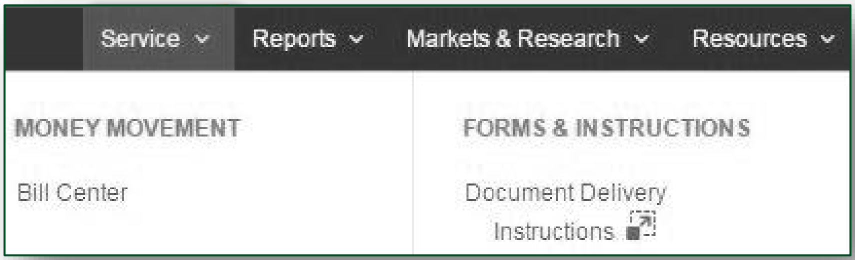
You can open the Documents tab to view your past statements, tax documents, confirms, and correspondence.



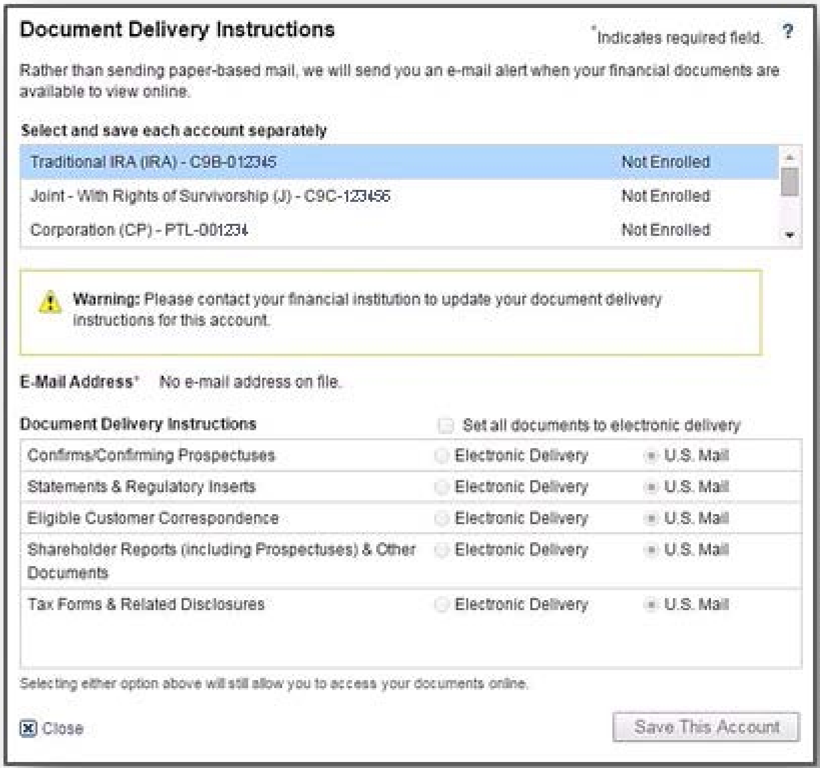
E-Delivery

If you want to set the document delivery options to e-Delivery, you can follow these simple instructions:

In the upper right corner, choose the Service Tab, and select Document Delivery Instructions.

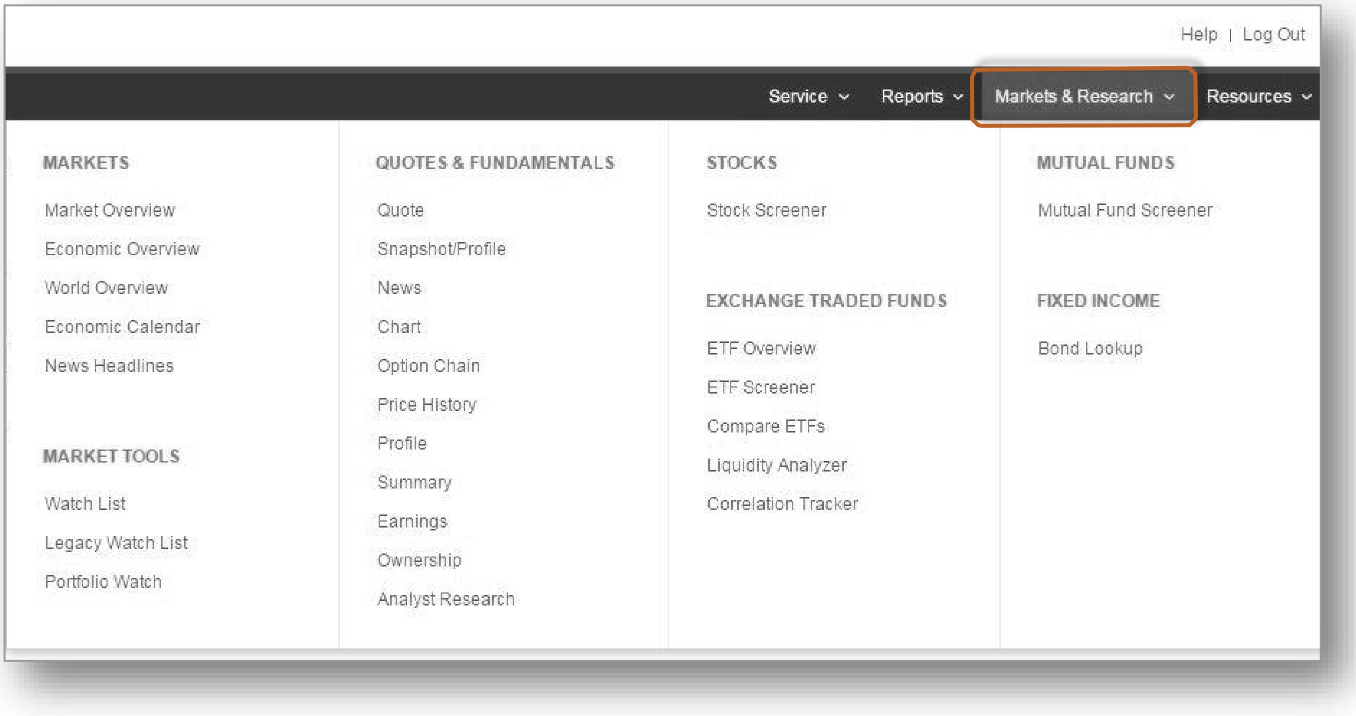


From there, you can personalize how you receive different documents per account.

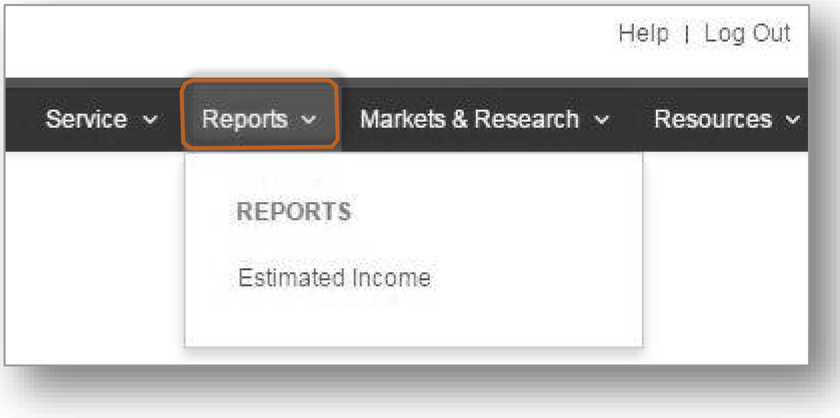


Market Research and Other Tools

You can also access several reports and financial feeds. You can access this information within Markets & Research.



You can also access an Estimated Income analysis under Reports.



Customizing User Options

You can customize Account Names, Passwords, Security Questions, and your Default Page by going to the Resources tab and choosing User Options.

A window appears that allows you to choose what option you wish to customize.