

Sammons Retirement Solutions

Account access when you need it

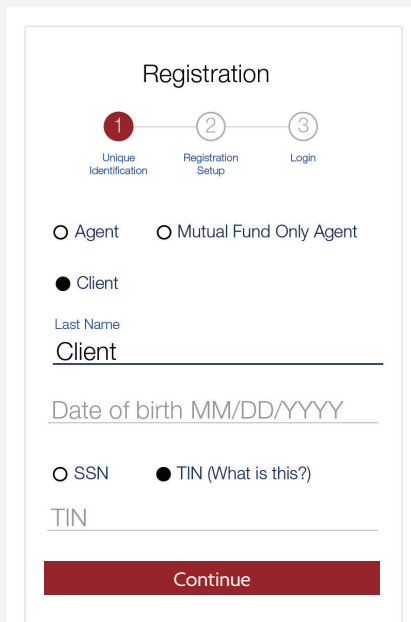


Online account access

New users will have to register for online access. After registration is complete, you can access your account by visiting srslivewellservice.com

Step 1

In your browser, go to srslivewellservice.com and select **“Register.”**



Registration

1 Unique Identification — 2 Registration Setup — 3 Login

Agent Mutual Fund Only Agent
 Client

Last Name

Date of birth MM/DD/YYYY

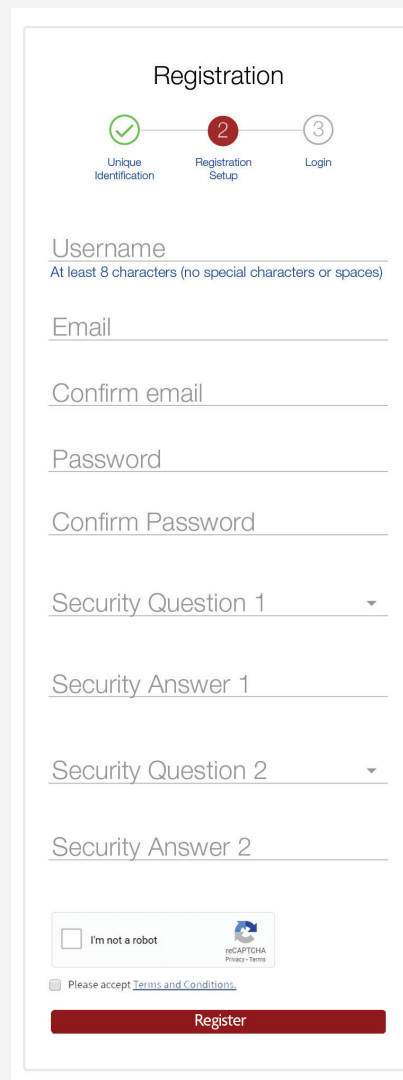
SSN TIN (What is this?)

TIN

Step 2

Enter the information requested and click the **“I am not a robot”** box. Click **“Register.”**

Please note: all fields are required.



Registration

Unique Identification — 2 Registration Setup — 3 Login

Username
At least 8 characters (no special characters or spaces)

Email

Confirm email

Password


Confirm Password

Security Question 1

Security Answer 1

Security Question 2

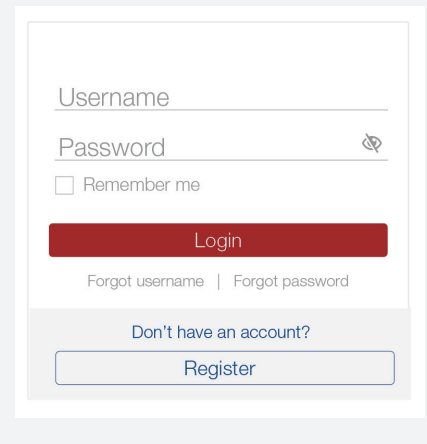
Security Answer 2

I'm not a robot 

Please accept [Terms and Conditions](#).

Step 3

Verify your username. Enter your email address and password. Click **“Login.”**



Username

Password

Remember me

[Forgot username](#) | [Forgot password](#)

Don't have an account?

Passwords must include:

Minimum 8 characters

- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 of the following special characters: @ ! * ()

No spaces or other special characters allowed

Service site verification code at login

To protect our clients' and financial professionals' personal data when logging into srsrivewellservice.com, we've added an extra layer of security to help confirm the user's identity.

It's easy. Here's how it works.

Upon first login on every device - PC, tablet, or cell phone:

- Users will be prompted to have a verification code sent to them.
- Upon receipt, users can input the code to complete the login process.

Remember: if users haven't accessed their account for more than 90 days, users will be prompted to request a verification code again.

Step 1

You will be asked to choose how you want to receive a verification code

Step 2

Check your device for the code

Step 3

Simply enter the verification code and you're done

An extra layer of security

We use verification codes to keep your account information safe and to confirm it's really you logging in. Let us know how you would like to receive your code below.

- Google Authenticator**
Enter single-use code from the mobile app.
[Setup](#)
- SMS Authentication**
Enter a single-use code sent to your mobile phone.
[Setup](#)
- Voice Call Authentication**
Use a phone to authenticate by following voice instructions.
[Setup](#)

Receive a code via SMS to authenticate

United States

+1 Phone number

[Send code](#)

[Forgot username](#) | [Forgot password](#)

[Don't have an account?](#)

[Register](#)

9:34 AM

Your verification code is 241356.

Now

Copy "241356"

+1 555-555-5555

Text message

SMS

Receive a code via SMS to authenticate

United States

+1 555-555-5555

Sent

241356

[Verify](#)



Customer Service

For customer support and/or help setting up your online access, please call Customer Service Specialists at 866-747-3421.



Additional Support

Please contact our office if you have any trouble or would like assistance.

StoneBridge Advisors, Inc.
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