Wealthscape Investor

Account access when you need it

Online account access

Your account with **Osaic Wealth** offers secure, password-protected access to your financial information via the Internet and mobile devices. This flexible and convenient service, along with the advice of your **Osaic Wealth** financial professional, can help you make more informed investment decisions.

Current Online Users

Re-register to access Wealthscape Investor:

1. Navigate to https://www.mystreetscape.com/ssc/authenticationsettings/osaic/new-user-registration.html
2. Click "Register"
3. Enter the prompts on screen to provide your First Name, Last Name, Date of Birth, and last four digits of your Social Security Number (SSN)
4. Once your identity has been verified, your username will be displayed on your confirmation page
5. Establish and confirm your password and create your security questions

Online Access & eDelivery Sender Email Address:

- Online Access

  New URL: https://www.wealthscapeinvestor.com/osaic

- New eDelivery notification email address:

  The NFS eDelivery notifications that tell you when your documents are available will come from a new email address: e-notification@mail.mybrokerageinfo.com

  You will continue to receive documents electronically for accounts enrolled in eDelivery prior to the transition. Any manually linked accounts (e.g., spouse or household member accounts) will also continue to display in Wealthscape Investor if accounts were linked prior to the transition.

- Multi-factor authentication

  Web users will be guided through multi-factor authentication enrollment. You will be asked for a one-time PIN upon each login to validate your identity and protect account information.

New User Online Registration

1. Visit www.wealthscapeinvestor.com/osaic to access the Login page.
2. Click the Register Now link.
3. Type in the last four digits of your Social Security Number (SSN), your first and last name, and your date of birth then select Next.

4. Enter your valid 9-digit brokerage account number, which can be found on a recent statement then select Next.
4. You will be prompted to establish and confirm your password and create your security questions then select Next.
5. A Confirmation states that the registration process was successful and provides your 10-digit user ID. Print the confirmation page by clicking the Print Icon.

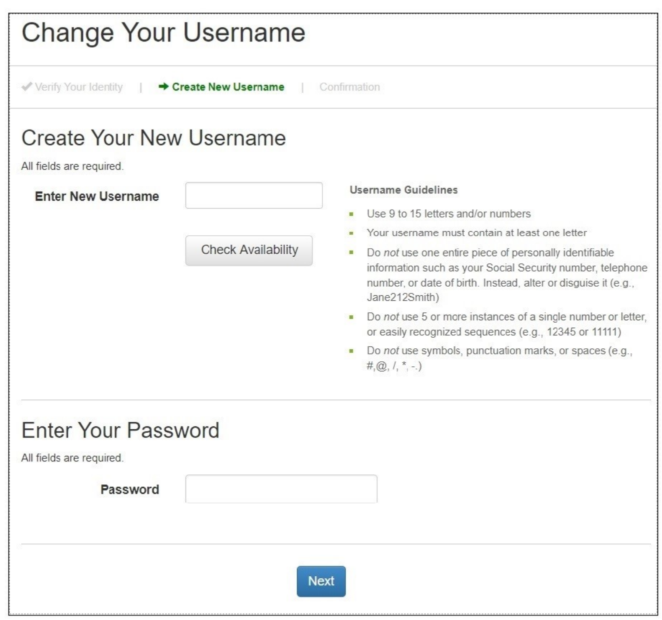
   IMPORANT NOTE: You should record your new ID before navigating away from this page as IDs will not be automatically emailed to you after registration.

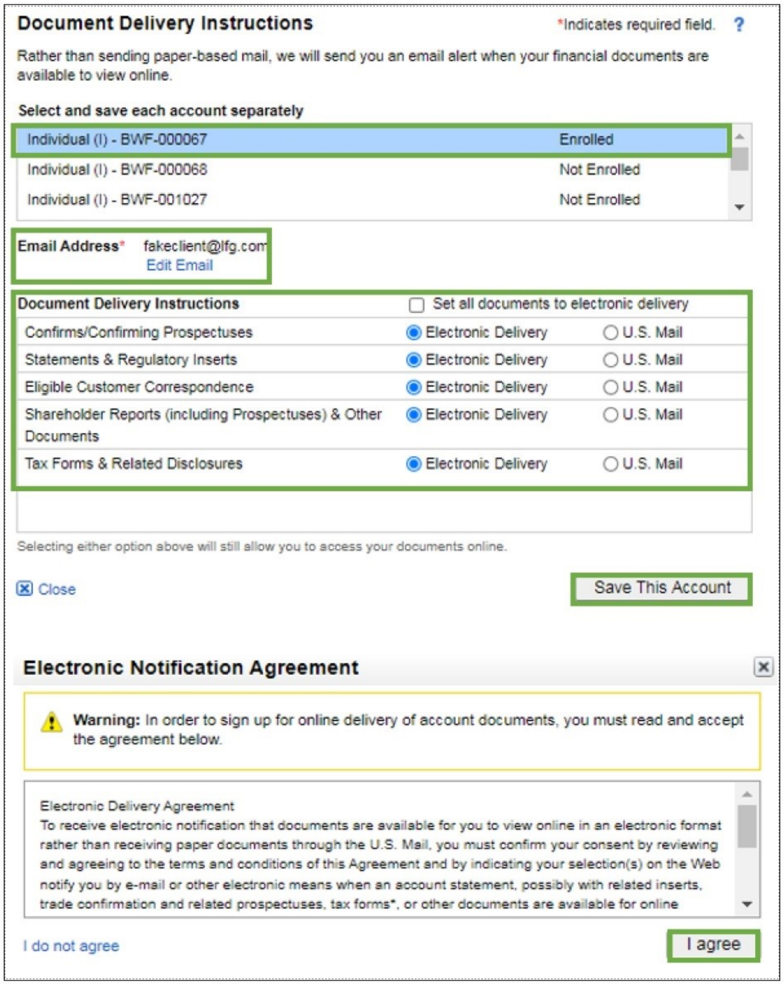
7. Select Continue to Home Page to proceed directly to the Wealthscape Investor home screen.

   Upon successful self-registration, your existing NFS brokerage accounts will automatically be linked to your User ID. As new NFS brokerage accounts are opened, they will be systematically linked to you existing user ID.

How to Create a Custom Username

1. Login to Wealthscape Investor.
2. From the Home page, select User Options.
3. Select Change Username.
4. Create your new Username following the Username Guidelines provided on the screen for choosing a valid username.
5. In the Enter New Username field, enter the new Username.
6. Select Check Availability to ensure that the username you've selected is not already taken.
7. Enter the login password in the Password box and select Next.
8. Select Continue to Home Page.





Going Paperless

1. Login to Wealthscape Investor.
2. Select Document Delivery Instructions from the Service Menu
3. Click an **account** and select the documents you'd like to receive via eDelivery (or you can check the Set All Documents to Electronic Delivery box to select all documents)
4. Click the Save This Account button and the I Agree button to complete eDelivery setup

Important Notes Regarding eDelivery

- Once enrolled in eDelivery, online delivery will begin within 24 hours. You may also receive paper documents already printed, depending on the timing of your enrollment. Any changes made to your eDelivery preferences may take a full statement cycle to be implemented.
- eDelivery is available for brokerage and advisory accounts on the NFS Platform.
- For Joint accounts, only one owner’s email address will receive eDelivery alerts.
- Undeliverable emails:
  - Attempts to deliver the email continue every 90 minutes.
  - After five attempts, an undeliverable email letter is sent to the account holder the same day to notify the account holder that a document is ready for online viewing. It also requests the account holder to review and update the electronic delivery email address if needed.
  - After five undeliverable email letters for confirmations and/or three for statements, the eDelivery service is revoked and the account automatically reverts to paper delivery.

Wealthscape Investor

View the information you need--when you need it--by logging into Wealthscape Investor and save the more complex aspects of your portfolio for discussion with your **Osaic Wealth** financial professional.

Quickly view your account information

With your online brokerage account, you’ll be able to:

- Customize the layout of your account information screens to sort and filter the data you want to focus on.
- Get real-time trade order status.
- Print or save copies of key account documents, such as statements, tax documents and trade confirmations.
- Check your positions in selected annuities.

Explore valuable market and research data[1]

You'll have access to a broad range of information you can use to track your portfolio and gain insight into market events, including the following:

- Dynamic charts and analytics
- Powerful investment screeners
- Comprehensive company profiles and fundamentals
- World overview perspective, including index listings and new headlines
- Economic overview with one-click access to five-day economic calendar
- User-created watch lists to monitor specific securities

Utilize optional online services

With these optional online services, you have easy access to information.

Account downloads

You'll be able to easily monitor cash flow, track expenses and access tax information:

- Download your account data to Quicken® for easy analysis.
- Import eligible tax forms from Wealthscape Investor into TurboTax°, H&R Block and TaxAct.

eDelivery

Simplify your recordkeeping by signing up for eDelivery.

- Suppress paper mailings of account statements, trade confirmations, prospectuses, shareholder reports, tax documents and proxies.
- You'll receive an email letting you know when a new document is available for viewing online.

Online Bill Pay[2]

Online Bill Pay can help you save time by streamlining the hassles associated with bill payment and management. With Complete Bill Management and Small Business Edition, you can

- Receive, review, pay and organize bills in one place.
- View up to 12 months of bill payment history.
- Schedule automatic and/or recurring payments and payment rules.
- Setup email alerts letting you know when a bill arrives, is coming due, and has been paid.
- Run reports by payee, date, funding account and payment status.

Ask your **Osaic Wealth** financial professional for additional information on the availability of online Bill Pay.

Learn more about Wealthscape Investor

Contact your **Osaic Wealth** financial professional for additional information on convenient Internet and mobile access to your securities brokerage account or for assistance.

StoneBridge Advisors, Inc.
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(443) 288-0781

[1]Research information is provided by third party sources and obtained from sources deemed reliable, but is not guaranteed.

[2]Complete Bill Management and Small Business Edition features are not appropriate for Retirement or **Osaic Wealth** Management Platform.