

# 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](mailto: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](http://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](#).

**Register Now**

Verify Your Identity

Last 4 Digits of Your SSN  [Don't have a SSN?](#)

First Name

Last Name

Date of Birth

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 your 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](#).

**Change Your Username**

✓ Verify Your Identity | → Create New Username | Confirmation

**Create Your New Username**

All fields are required.

Enter New Username

**Username Guidelines**

- Use 9 to 15 letters and/or numbers
- Your username must contain at least one letter
- Do not use one entire piece of personally identifiable information such as your Social Security number, telephone number, or date of birth. Instead, alter or disguise it (e.g., Jane212Smith)
- Do not use 5 or more instances of a single number or letter, or easily recognized sequences (e.g., 12345 or 11111)
- Do not use symbols, punctuation marks, or spaces (e.g., #, @, /, \*, -)

**Enter Your Password**

All fields are required.

Password

**Document Delivery Instructions** \*Indicates required field. ?

Rather than sending paper-based mail, we will send you an email alert when your financial documents are available to view online.

Select and save each account separately

Individual (I) - BWF-000067	Enrolled
Individual (I) - BWF-000068	Not Enrolled
Individual (I) - BWF-001027	Not Enrolled

Email Address\* fakeclient@fmg.com  
[Edit Email](#)

Document Delivery Instructions	<input type="checkbox"/> Set all documents to electronic delivery
Confirms/Confirming Prospectuses	<input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail
Statements & Regulatory Inserts	<input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail
Eligible Customer Correspondence	<input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail
Shareholder Reports (including Prospectuses) & Other Documents	<input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail
Tax Forms & Related Disclosures	<input checked="" type="radio"/> Electronic Delivery <input type="radio"/> U.S. Mail

Selecting either option above will still allow you to access your documents online.

Close **Save This Account**

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**Electronic Notification Agreement** ✕

**Warning:** In order to sign up for online delivery of account documents, you must read and accept the agreement below.

Electronic Delivery Agreement  
 To receive electronic notification that documents are available for you to view online in an electronic format rather than receiving paper documents through the U.S. Mail, you must confirm your consent by reviewing and agreeing to the terms and conditions of this Agreement and by indicating your selection(s) on the Web notify you by e-mail or other electronic means when an account statement, possibly with related inserts, trade confirmation and related prospectuses, tax forms\*, or other documents are available for online

I do not agree **I agree**



## 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<sup>1</sup>

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<sup>2</sup>

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.**  
**24 Frederick Road ■ Ellicott City, MD 21043**  
**(443) 288-0781**

System availability and response time may be subject to market conditions. Wealthscape Investor<sup>SM</sup> is a service mark of FMR LLC.

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<sup>1</sup>Research information is provided by third party sources and obtained from sources deemed reliable, but is not guaranteed.

<sup>2</sup>Complete Bill Management and Small Business Edition features are not appropriate for Retirement or **Osaic Wealth** Management Platform.

