

Guide to Statements and Tax Forms, eDelivery and Linking Account Views via the eQuipt Client Portal

This guide allows you to:

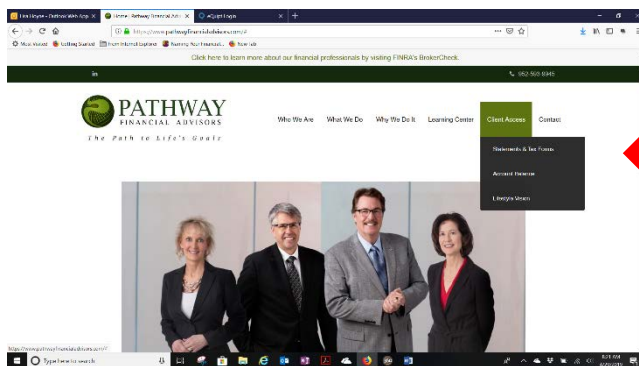
Define eDelivery preferences for account communications (statements, confirms, tax documents, etc.)

Create a single log-in access to multiple investment accounts through a single login, including the ability to link household accounts as well.

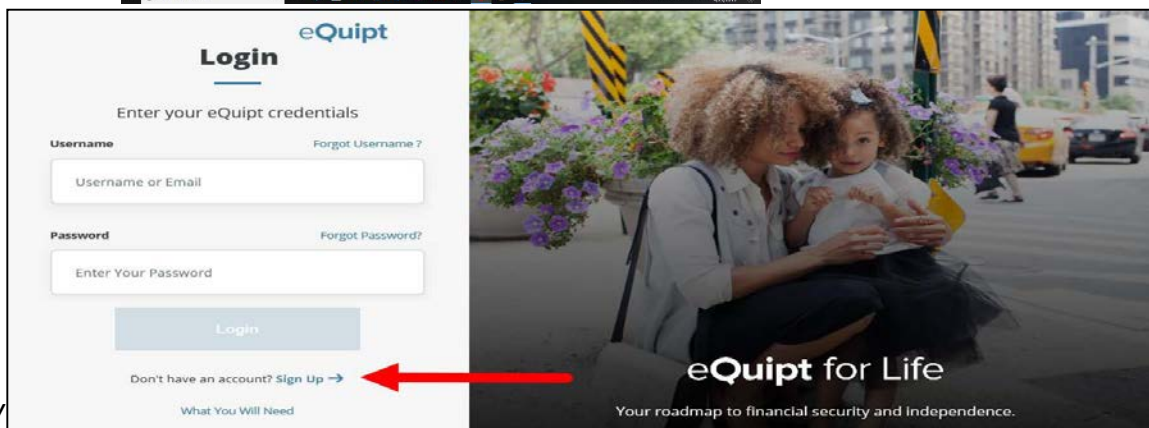
Enrolling Instructions

In order to access eQuipt Client Portal, you must first complete a quick **one-time** enrollment process to set up your user ID and password, as well as to provide some basic identity-verification information (this will be used in case you ever need assistance in logging in). Only one login is needed to view all of your accounts (eQuipt Client Portal will automatically display all accounts registered to your SSN, and you have the ability to link accounts for spouses, children, etc.).

To enroll, navigate to the [Pathway Financial Advisors website](#) to the Client Access tab, select Statements and Tax Forms, listed as the first option, within the drop down menu. This will take you to the eQuipt Login screen.



Client Access Tab: Select Statements & Tax Forms



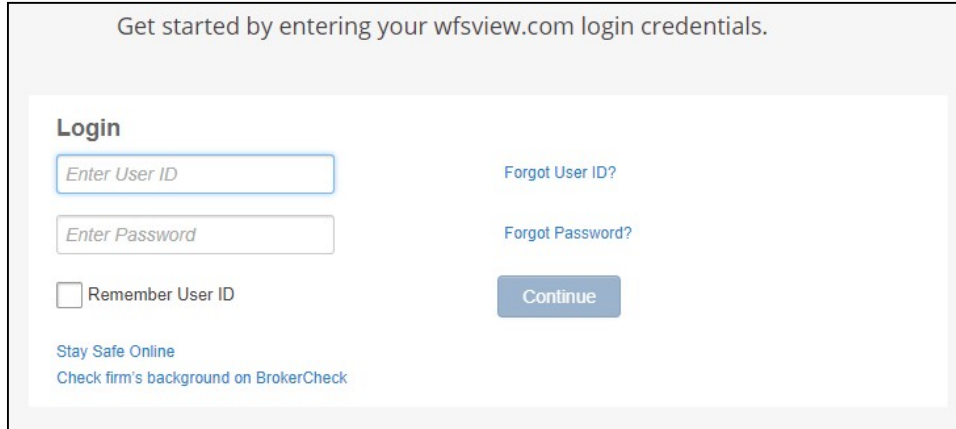
Yes, in for wfsview.com?".
NetXInvestor (www.wfsview.com) was our previous site, prior to the release of the new eQuipt Client Portal

- If you have been using NetXInvestor to access your accounts, select Yes and then click Continue. See page 4. Also remember to update your browser bookmarks.
- If you have not previously accessed your accounts online using NetXInvestor, select No and then click Continue. See page 5.

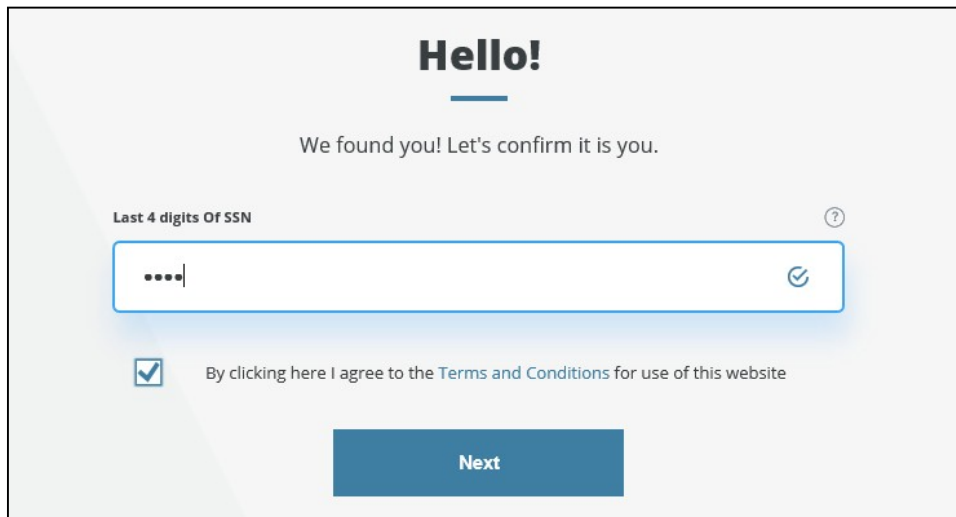
Enrollment for NetXInvestor Users

If you selected Yes to indicate that you have previously accessed your accounts on NetXInvestor:

1. Provide your NetXInvestor *User ID* and *Password*, then click Continue



2. Input the last 4 digits of your SSN to confirm your identity, and mark the checkbox to accept the *Terms and Conditions*. Then click Next to continue.

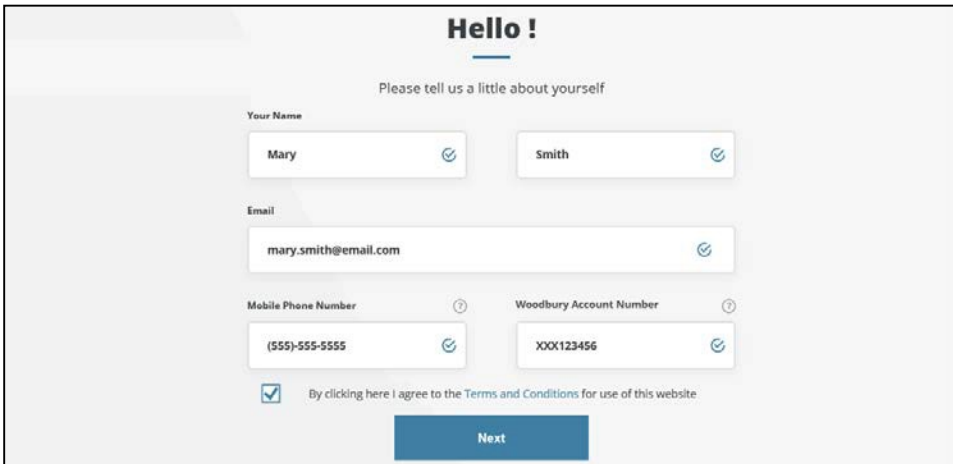


3. Provide your *Email* and *Mobile Phone Number* (used in case you need assistance in logging in) and click Next to continue.
4. Create your new eQuipt *Username* and *Password*. The username will default to your email address, but can be changed. The password must be at least 8 characters and contain at least 1 number, 1 letter, and 1 special character. Click Next to complete the enrollment process. Remember to bookmark the [Pathway Financial Advisors website](#) in your browser's Favorite List.

Enrollment for New Users

If you selected No to indicate that you have not previously accessed your accounts on NetXInvestor:

1. Input your *Name, Email, Mobile Phone Number* (used in case you need assistance in logging in), and *Woodbury Account Number* (if you have multiple accounts you only need to input one; eQuipt Client Portal will automatically link all accounts for your SSN). Mark the checkbox to accept the *Terms and Conditions* and click Next.



Hello !
Please tell us a little about yourself

Your Name
Mary Smith

Email
mary.smith@email.com

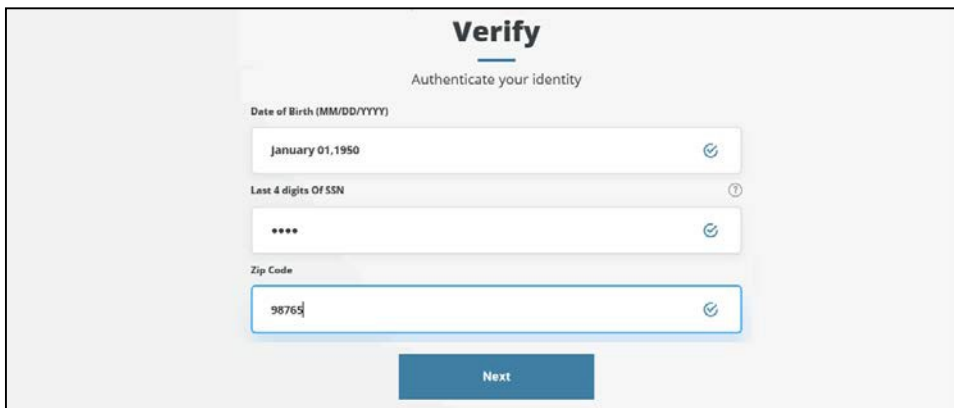
Mobile Phone Number
(555)-555-5555

Woodbury Account Number
XXX123456

By clicking here I agree to the Terms and Conditions for use of this website

Next

2. On the next page verify your identity by inputting your *Date of Birth, Last 4 Digits of SSN*, and *Zip Code* and click Next



Verify
Authenticate your identity

Date of Birth (MM/DD/YYYY)
January 01, 1950

Last 4 digits of SSN

Zip Code
98765

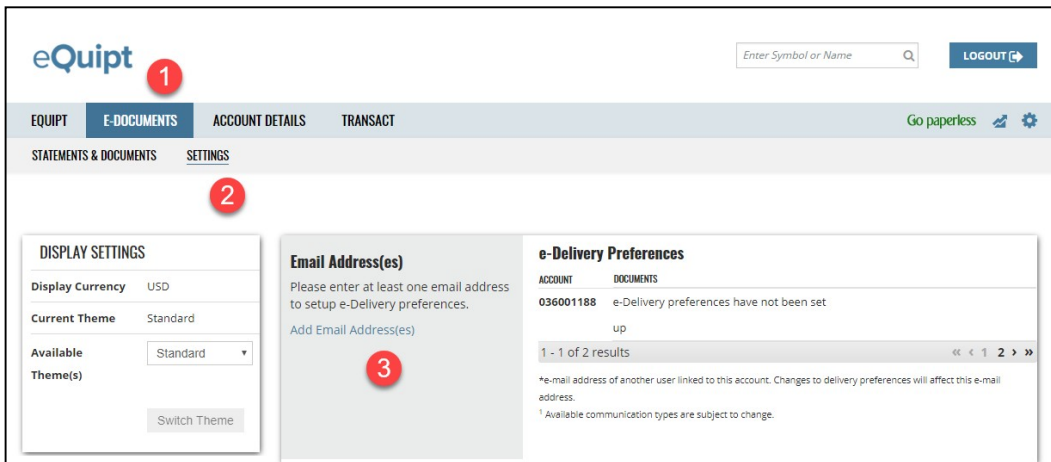
Next

3. On the last page create your new eQuipt Client Portal *Username* and *Password*. The username will default to your email address, but can be changed. The password must be at least 8 characters and contain at least 1 number, 1 letter, and 1 special character. Click Next to complete the enrollment process. Remember to save the [Pathway Financial Advisors website](#) to your browser's Favorites List!

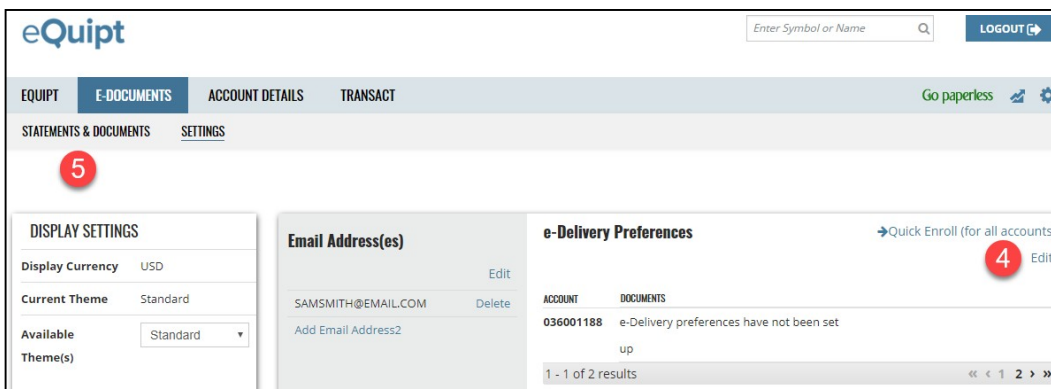
eDelivery Preferences

You have the option of receiving account communications (e.g. statements, trade confirmations, tax documents, etc.) electronically rather than in paper. To view/change your eDelivery preferences, complete the following steps (shown for both standard and Accessible themes):

1. Click the e-Documents tab
2. Select Settings
3. Click Add Email Address(es) and input up to 2 email addresses
4. Click Edit or Quick Enroll in eDelivery Preferences section of the screen. In either case you will then be able to select which communications should be sent electronically. The Edit option enables you to customize selections on an account-by-account basis; the Quick Enroll option applies your settings to all accounts.
5. Future communications will display in the e-Documents tab. Select Statements & Documents.



The screenshot shows the eQuipt user interface. At the top left is the eQuipt logo. A red circle with the number '1' is placed over the 'E-DOCUMENTS' tab in the navigation bar. Below the navigation bar, there are two sub-tabs: 'STATEMENTS & DOCUMENTS' and 'SETTINGS'. A red circle with the number '2' is placed over the 'SETTINGS' sub-tab. The main content area is divided into three columns. The left column contains 'DISPLAY SETTINGS' with options for 'Display Currency' (USD), 'Current Theme' (Standard), and 'Available Theme(s)' (Standard). The middle column is titled 'Email Address(es)' and contains a text input field with a red circle '3' over the 'Add Email Address(es)' link. The right column is titled 'e-Delivery Preferences' and shows a table with columns for 'ACCOUNT' and 'DOCUMENTS'. The table contains one row for account '036001188' with the text 'e-Delivery preferences have not been set up'. Below the table, there are pagination controls showing '1 - 1 of 2 results' and a 'Quick Enroll' link.



The screenshot shows the eQuipt user interface after the user has added an email address. A red circle with the number '5' is placed over the 'STATEMENTS & DOCUMENTS' sub-tab. The 'Email Address(es)' column now shows the email address 'SAMSMITH@EMAIL.COM' with 'Edit' and 'Delete' links. The 'e-Delivery Preferences' column now shows a 'Quick Enroll (for all accounts)' link and an 'Edit' link, with a red circle '4' placed over the 'Edit' link. The table content remains the same as in the previous screenshot.



Last Login: Mar 22, 2019 12:13 AM (ET)

eQuipt

E-Documents » Settings

OVERVIEW

EQUIPT

▼ E-DOCUMENTS **1**

All Documents

Settings **2**

> ACCOUNT DETAILS

> TRANSACT

LOGOUT

Settings

This page allows you to update your site settings and preferences, including security settings, account display preferences, eDelivery settings, alerts setup and theme selection.

Page Contents

↓ Display Settings

↓ e-Delivery Preferences

Display Settings

Display Currency	USD
Current Theme	Accessible
Available Theme(s)	Accessible

Switch Theme

↑ Back to Page Contents

e-Delivery Preferences

Email Address(es)

Please enter at least one **3** address to setup e-Delivery preferences.

Add Email Address(es)

eQuipt

Last Login: Mar 22, 2019 12:13 AM (ET)

E-Documents » Settings

OVERVIEW

EQUIPT

▼ E-DOCUMENTS

All Documents **5**

Settings

> ACCOUNT DETAILS

> TRANSACT

LOGOUT

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Page Contents

↓ Display Settings

↓ e-Delivery Preferences

Display Settings

Display Currency	USD
Current Theme	Accessible
Available Theme(s)	Accessible

Switch Theme

↑ Back to Page Contents

e-Delivery Preferences

Email Address(es)

	Edit
JIM@EMAIL.COM	Delete
Add Email Address2	

e-Delivery Preferences

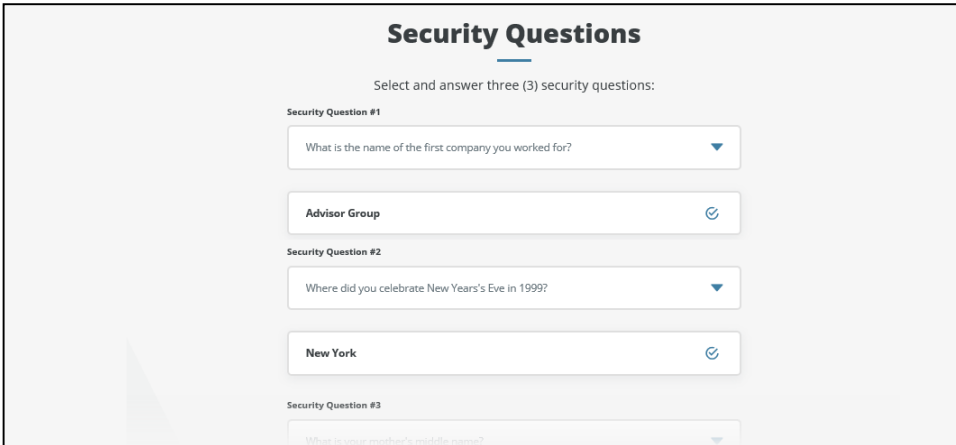
→ Quick Enroll (for all accounts)

4 Edit

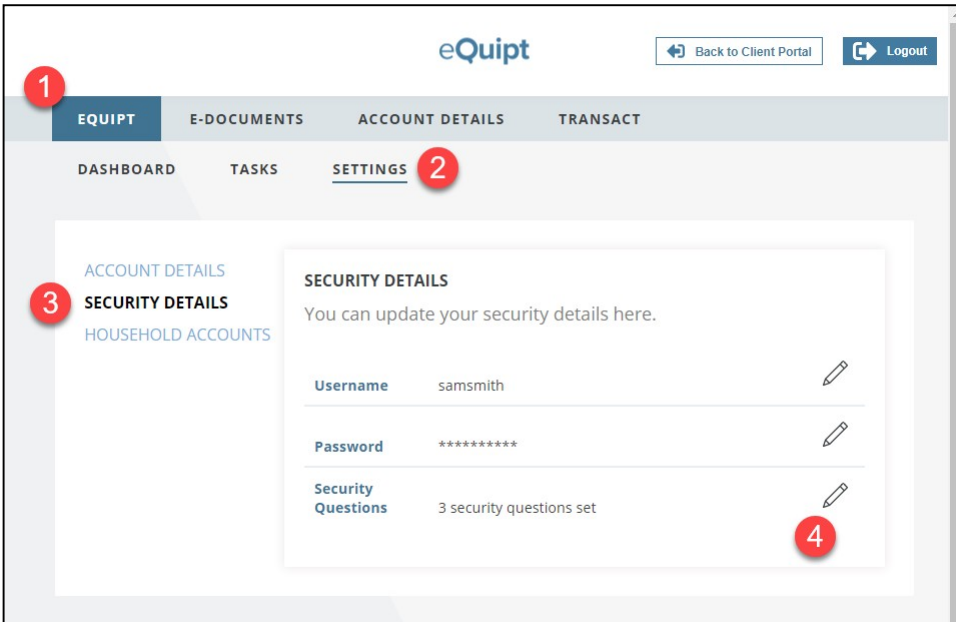
ACCOUNT DOCUMENTS

Security Questions

After enrolling in eQuipt Client Portal, in a subsequent login you will be prompted to select 3 security questions from a menu of options, and input an answer for each selected question. This provides an additional security layer that can be used in case you ever forget your login credentials.



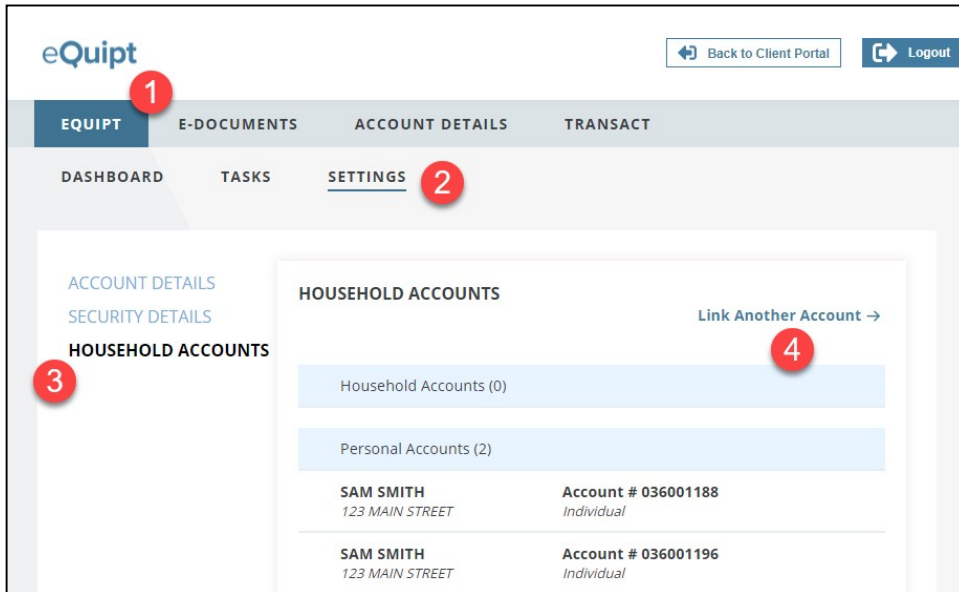
Security questions can also be set up and/or updated by:



1. Click the eQuipt tab
2. Select Settings
3. Select Security Details
4. Click the pencil icon next to Security Questions

Accessing Multiple Accounts

eQuipt Client Portal automatically provides you with access to all accounts established under your SSN, using a single login. Additional accounts for other people in your household (spouse, children, etc.) can be linked to your login as well, following the instructions below. Note, however, that accounts for entities (trusts, businesses, etc.) can only be linked by sending the request to your advisor.



1. Click the eQuipt tab
2. Select Settings
3. Select Household Accounts
4. Click Link Another Account

On the next screen you will be asked to provide the information about the account being linked including its *Woodbury Account Number, Last 4 digits of SSN, Date of Birth, and Zip Code*. Once you have inputted this information click the Link button.