WEALTHSCAPE INVESTOR ONLINE ACCESS

USERNAME: ___________________________

PASSWORD: ___________________________

This portal gives you access to your Stein Wealth Advisor accounts via the custodial website (National Financial Services – NFS). In Wealthscape, you will be able to:

- Access your accounts anytime, anywhere
- Check your account balances, positions and activity history
- View statements, confirmations, tax documents and correspondence
- View market information
- Manage your paperless delivery settings

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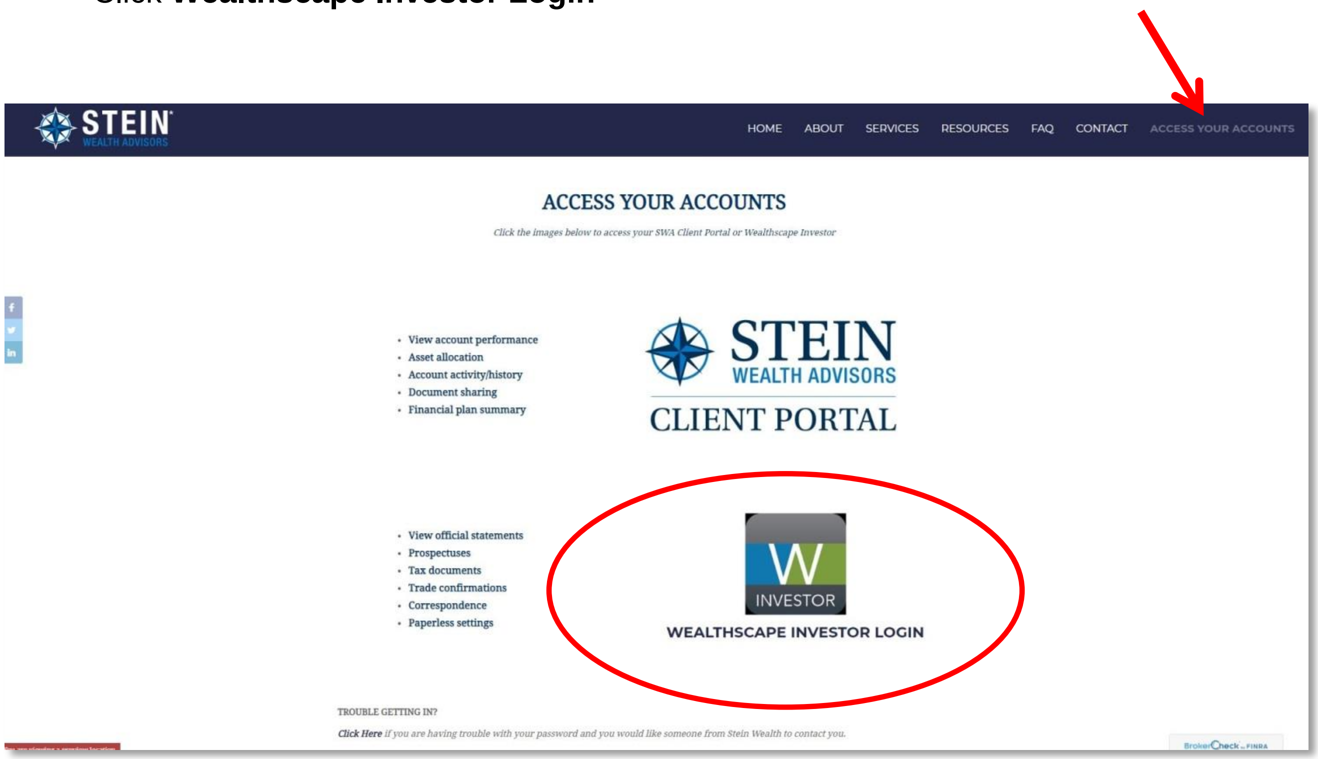
Get Started

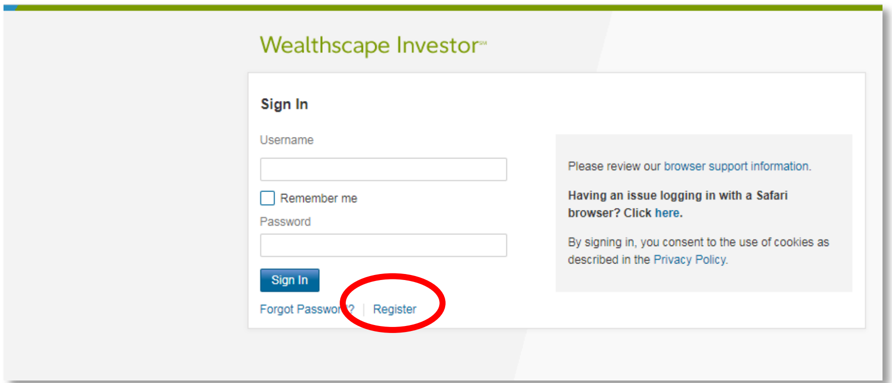
Access all portal links through our website at: http://www.steinwealth.com

- Click **Access Your Accounts** on the top right banner
- Click **Wealthscape Investor Login**

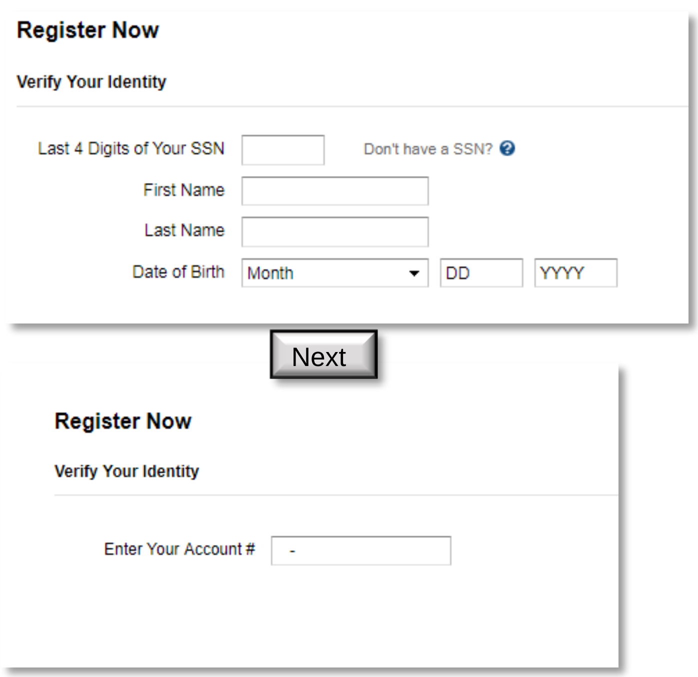


Register:

- Click **Register**

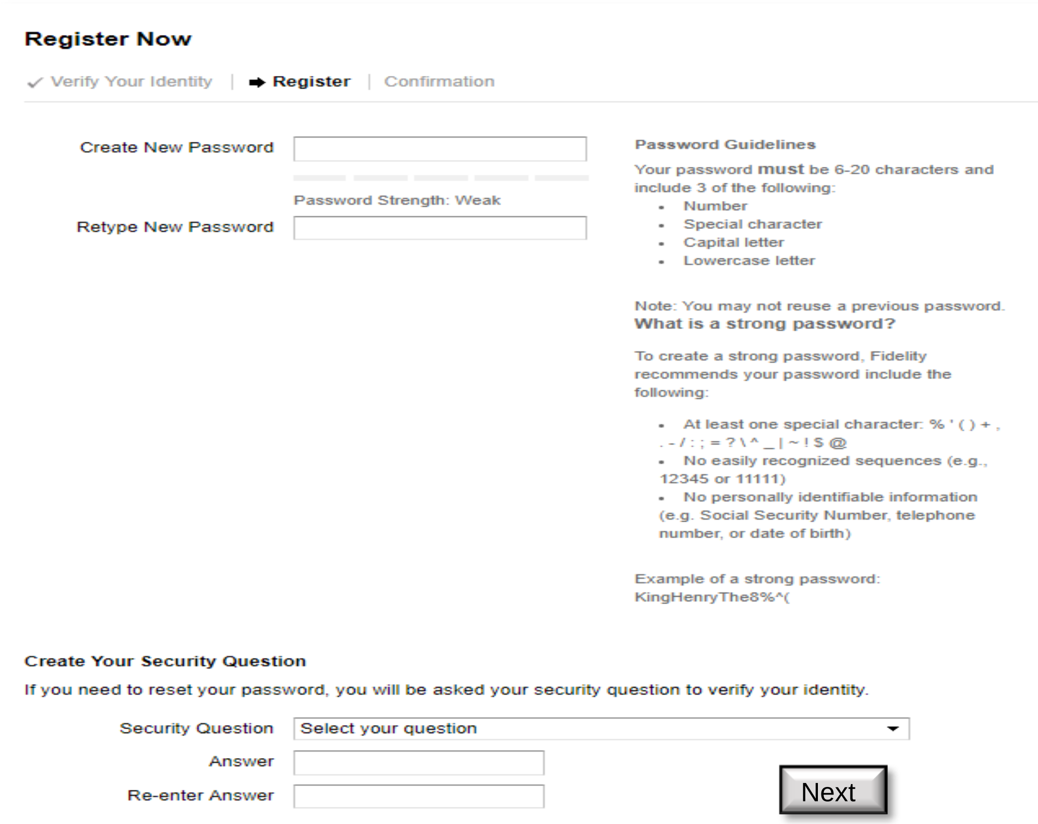


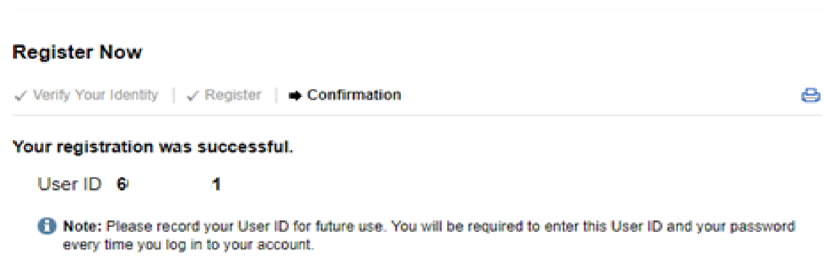
Enter an account number associated with your social security number. You can find your account numbers on your welcome letter and account opening paperwork.



For your convenience, we have consolidated all household accounts on one login. If you wish to have this set up differently, please contact us and let us know.

Next, create your password and security questions. Be sure to follow the specific password guidelines listed below:





You are now successfully registered! Your User ID will be all numbers. You have the option to create a custom User ID once you login.

**Please record your User ID, Password and Security Questions for future use*

Stay Connected:

<u>Mobile App</u>

Download the Wealthscape Investor Brokerage Mobile app for your Tablet and smartphone and tap into your account when you're on the go.
This mobile app allows you to:

- Get access virtually anytime
- Check your account balances, positions & history
- View market information
- Create watch lists and price trigger alerts

Get the free mobile app from the Apple Store or Google

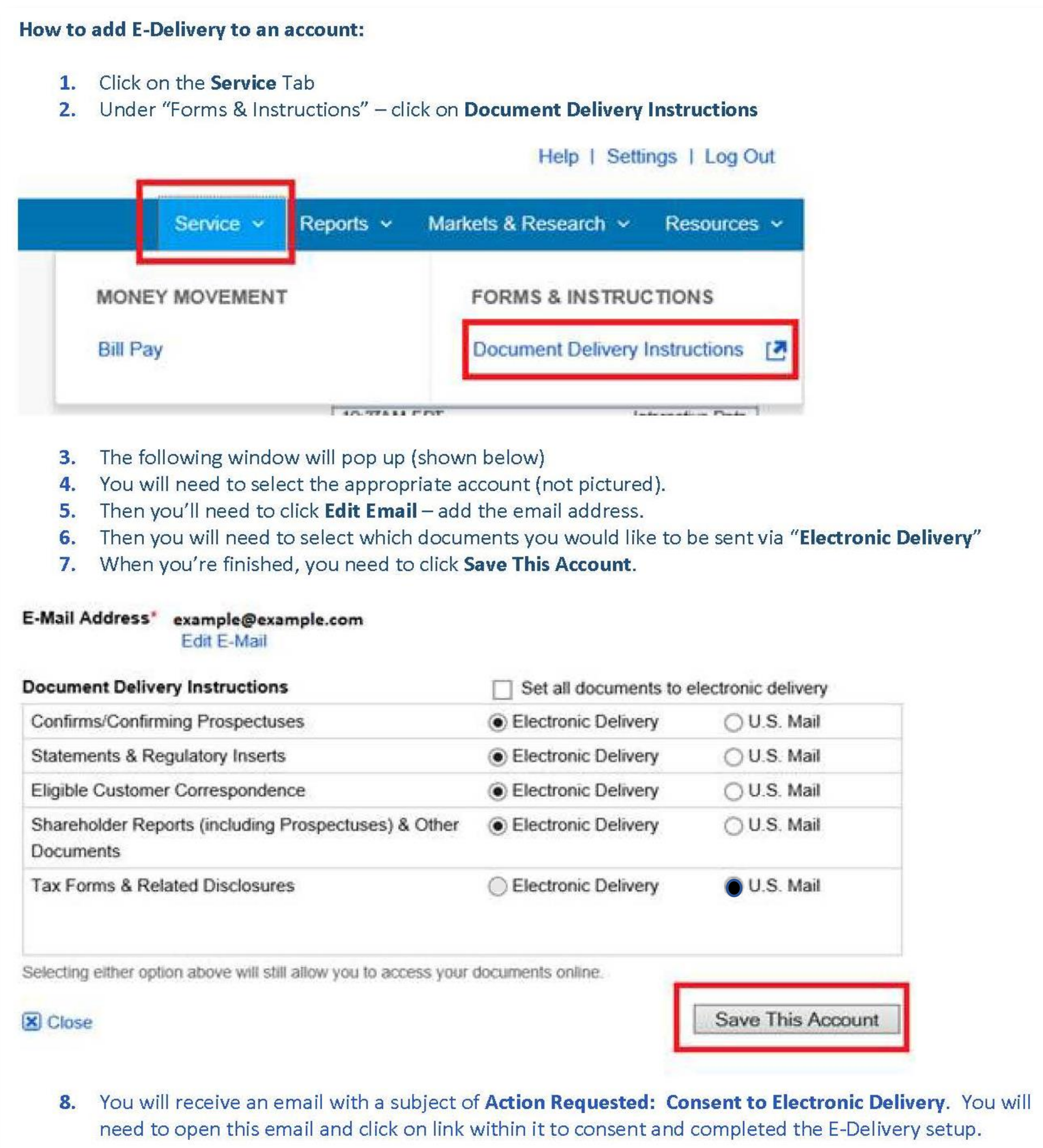
Go Paperless:

<u>Confirmations, Prospectus, Statements & Tax Documents</u>

- Once you log in, you should **Go Paperless**

We generally suggest going all paperless except for tax documents.

**Your account will be charged a fee if you receive any documents by mail except for tax documents*



How to add E-Delivery to an account:

1. Click on the **Service** Tab
2. Under "Forms & Instructions" – click on **Document Delivery Instructions**

3. The following window will pop up (shown below)
4. You will need to select the appropriate account (not pictured).
5. Then you'll need to click **Edit Email** – add the email address.
6. Then you will need to select which documents you would like to be sent via "**Electronic Delivery**"
7. When you're finished, you need to click **Save This Account**.

E-Mail Address* **example@example.com**
Edit E-Mail

Document Delivery Instructions ☐ Set all documents to electronic delivery

Confirms/Confirming Prospectuses	◉ Electronic Delivery	○ U.S. Mail
Statements & Regulatory Inserts	◉ Electronic Delivery	○ U.S. Mail
Eligible Customer Correspondence	◉ Electronic Delivery	○ U.S. Mail
Shareholder Reports (including Prospectuses) & Other Documents	◉ Electronic Delivery	○ U.S. Mail
Tax Forms & Related Disclosures	○ Electronic Delivery	◉ U.S. Mail

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

☒ Close　　Save This Account

8. You will receive an email with a subject of **Action Requested: Consent to Electronic Delivery**. You will need to open this email and click on link within it to consent and completed the E-Delivery setup.

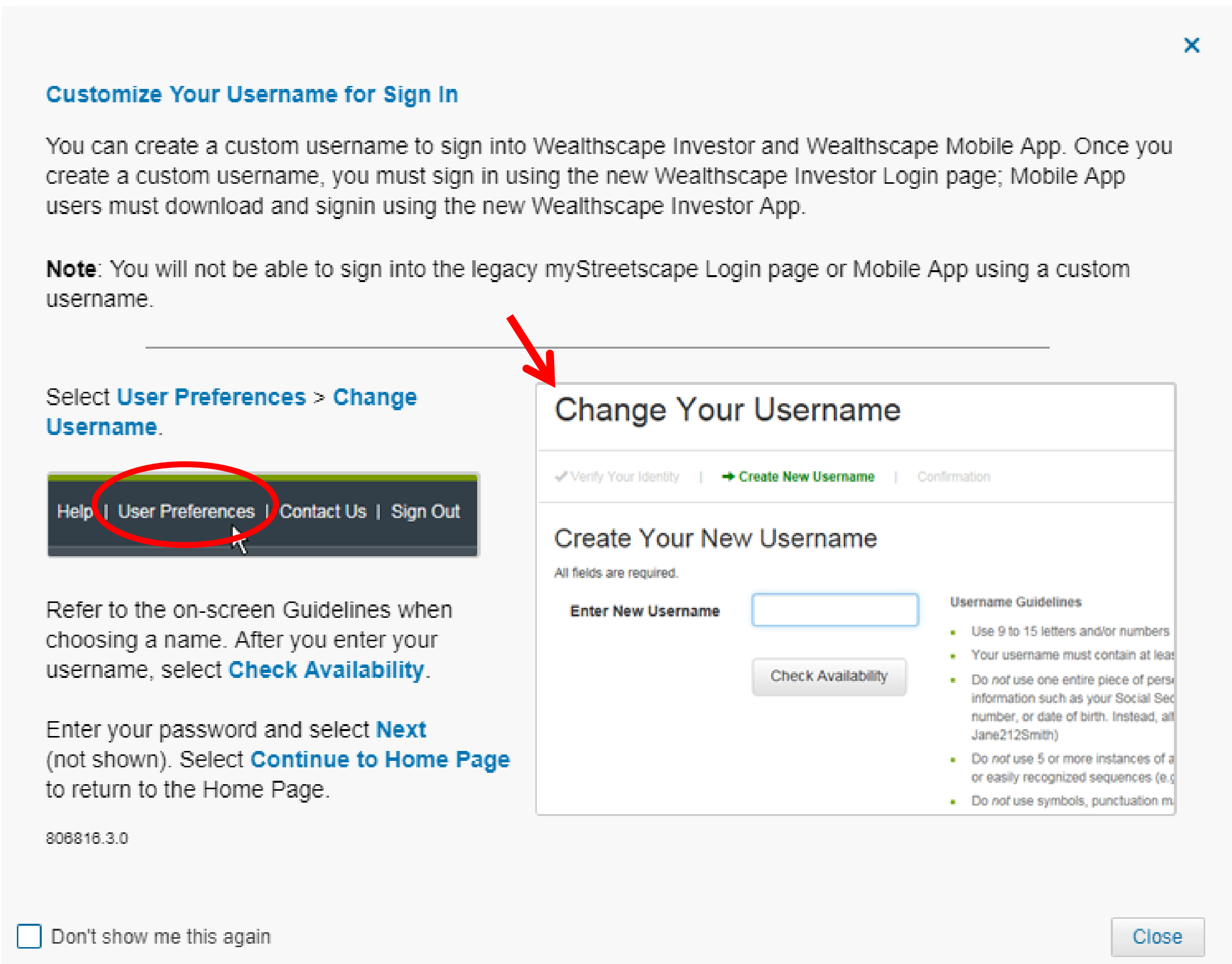
Customization:

<u>User ID</u>

The Custom Username Function allows you to create a custom username. Usernames can contain nine to fifteen letters and/or numbers and must contain at least one letter. (Symbols, punctuation marks and spaces are not allowed.)

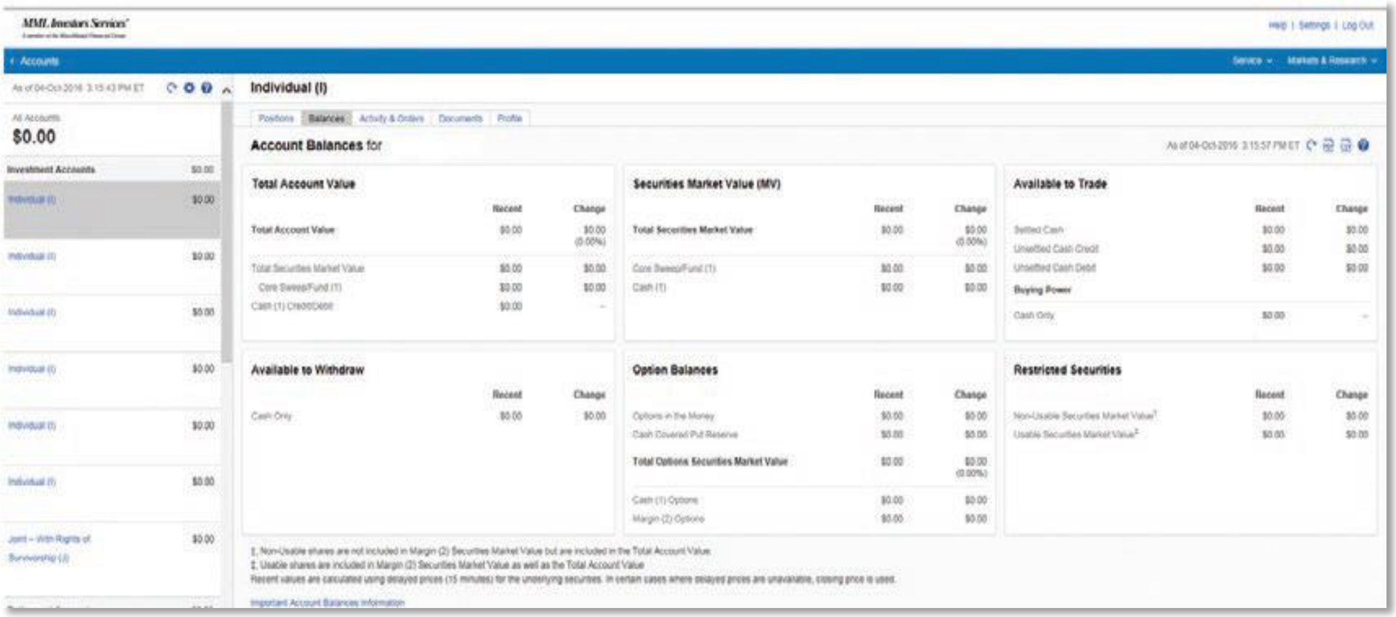
**Changes to your username or password can only be done through the Wealthscape Investor desktop website*

1) Click **User Preferences**
2) Select **Change Username**
3) Create New Username



Layout

Customize the layout of your Account Positions screen to sort and filter the data you want to focus on.



Reset/Change your Password:

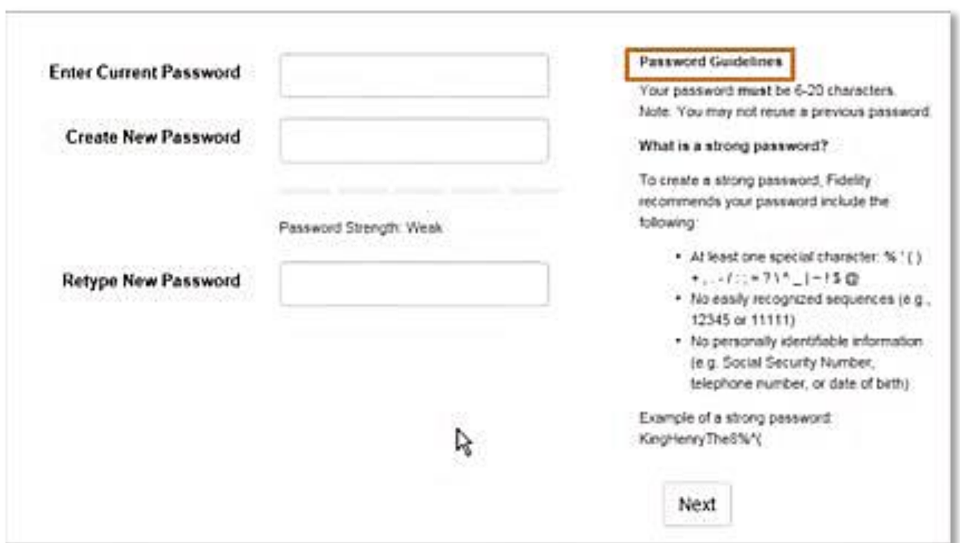
To reset the password associated with your username,

- Click the **Forgot Password?**
- Enter Your Username
- Answer your Security Question
- Create a New Password

**If you are unsuccessful after multiple attempts, please call us at 724-260-0491*

To change your password,

- Click **User Preferences**
- Select **Change Password**
- **Enter Current Password**
- **Create New Password** (following password guidelines)
- Enter the new password again
- Click **Next**

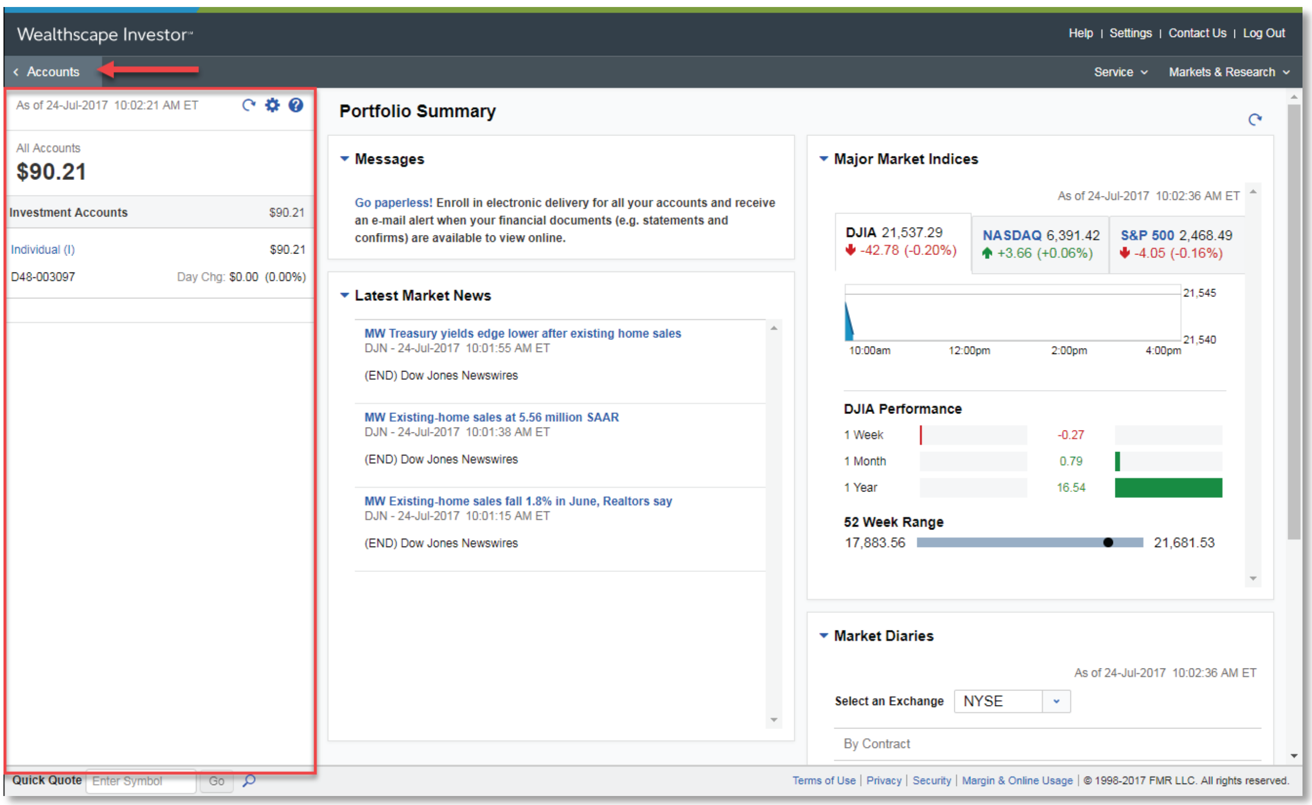


Access Account Information:

Holdings, Activity Updates and Transaction History

Once your registration is complete, you may access your accounts, positions and balances online.

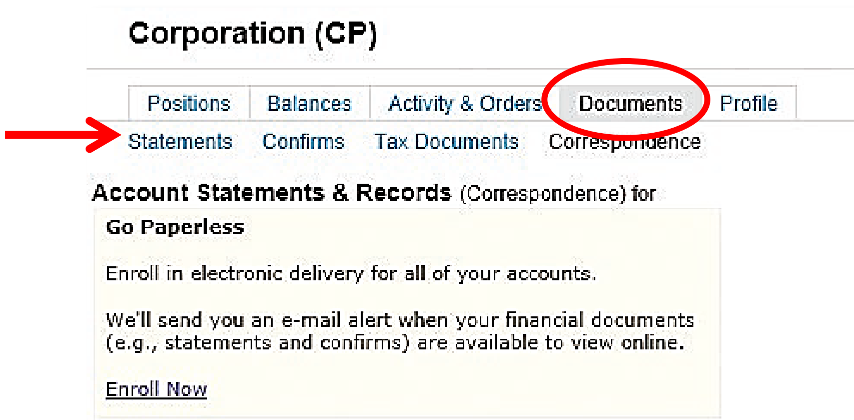
- Select the account you wish to view from the list in the left-column
- Select the tabs at the top of the page to view your account holdings, activity updates and two years of transaction history



Access Key Documents:

Statements, Confirms, Tax Documents and Correspondence

- Click **Accounts**
- Select the account you want to access documents for
- Select the **Documents** tab
- Select the type of document you want to view

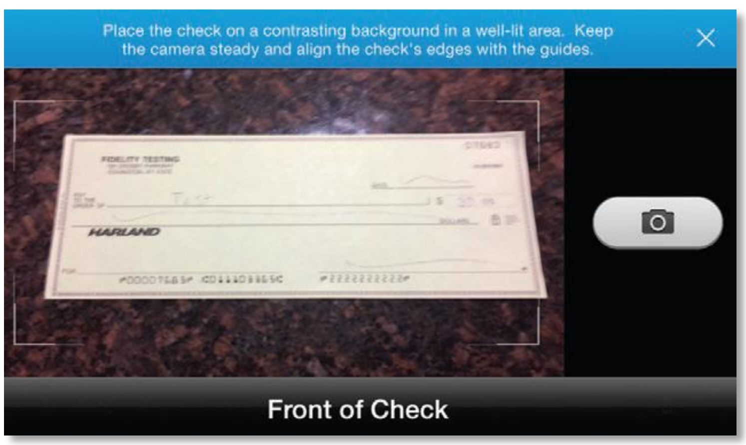


Deposit Checks:

Through the Wealthscape Investor Brokerage Mobile App, **Mobile Check Deposit** allows users to make deposits from their mobile device.

- To make a Mobile Deposit:
  - Make checks payable to NFS <account number>
    - If it is an IRA, please note which tax year (current or prior year contribution) in the memo line
  - Endorse the check "for deposit only to my NFS Account"
  - Open the Wealthscape Investor App on your phone or notebook
  - From the home screen, Select **Money Movement,** then **Deposit Check**
  - Snap a photo of the front and back of the check using the camera on your device
  - Follow the prompts to enter the deposit amount and the desired account(s)
  - Verify the deposit details and submit the deposit

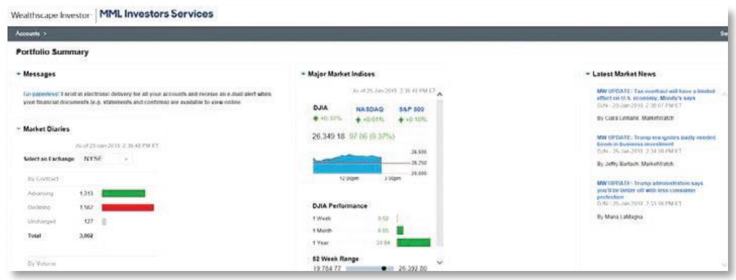
The deposit is immediately sent to NFS for review and approval, transmitted to the bank for processing and posted to the brokerage account. Deposits submitted on a business day prior to 4 p.m. ET and in good order will be posted the same business day.



Utilize Market Data and Research Tools:

The website offers a broad range of information you can use to track your portfolio and gain insight into market events. You have access to detailed investment profiles, comprehensive company profiles, ad fundamentals, and dynamic charts and analytics.

1) Access **Markets & Research** through the link in the upper right-corner on your account screen



2) Select from a list of options, including market overviews and watch lists, investment quotes and fundamentals