



STEIN
WEALTH ADVISORS

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

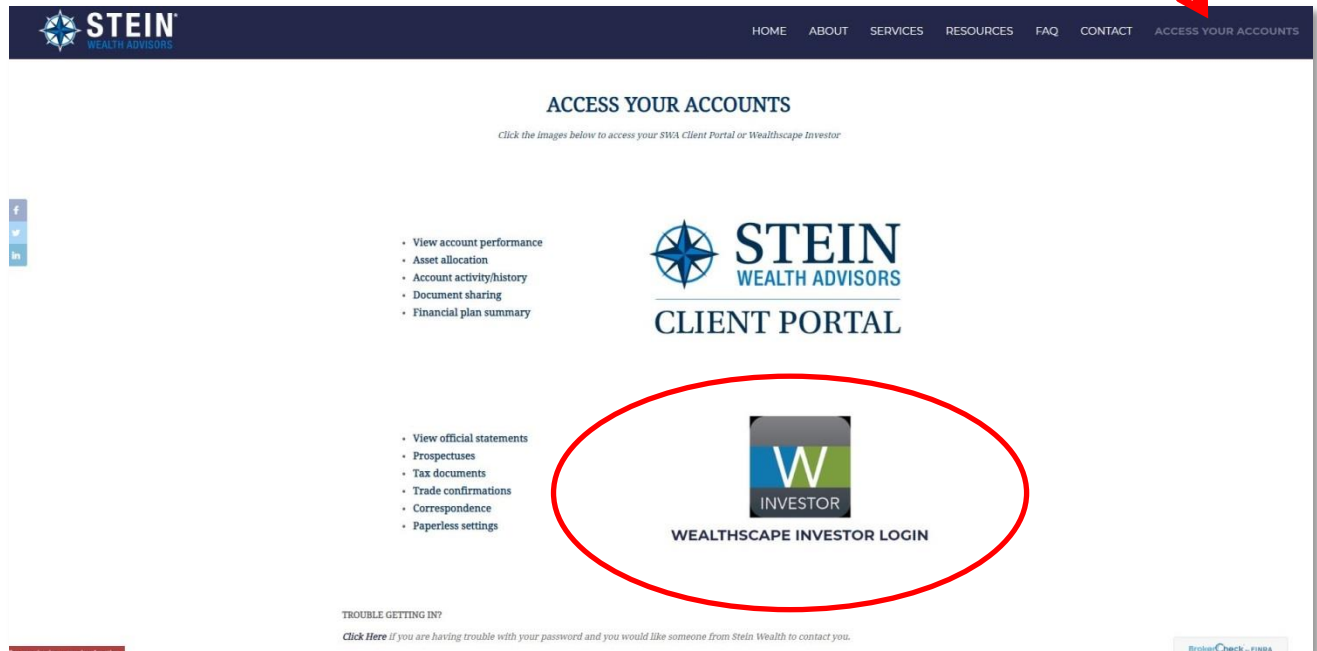
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Get Started

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

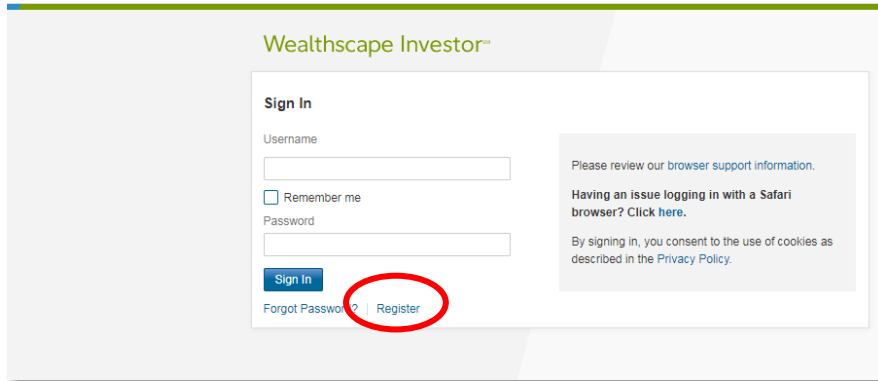
- Click **Access Your Accounts** on the top right banner
- Click **Wealthscape Investor Login**



The screenshot shows the Stein Wealth Advisors website. At the top, there is a dark blue navigation bar with the Stein Wealth Advisors logo on the left and links for HOME, ABOUT, SERVICES, RESOURCES, FAQ, CONTACT, and ACCESS YOUR ACCOUNTS on the right. A red arrow points to the 'ACCESS YOUR ACCOUNTS' link. Below the navigation bar, the main content area is titled 'ACCESS YOUR ACCOUNTS' with a sub-header 'Click the Images below to access your SWA Client Portal or Wealthscape Investor'. On the left side, there are social media icons for Facebook, Twitter, and LinkedIn. In the center, there are two main sections. The top section is for the 'STEIN WEALTH ADVISORS CLIENT PORTAL' and includes a list of links: View account performance, Asset allocation, Account activity/history, Document sharing, and Financial plan summary. The bottom section is for 'WEALTHSCAPE INVESTOR LOGIN' and includes a list of links: View official statements, Prospectuses, Tax documents, Trade confirmations, Correspondence, and Paperless settings. A red oval highlights the 'WEALTHSCAPE INVESTOR LOGIN' button. At the bottom of the page, there is a 'TROUBLE GETTING IN?' section with a link to click here if having trouble with a password, and a 'BrokerCheck - FINRA' link in the bottom right corner.

Register:

- Click **Register**



Wealthscape Investor™

Sign In

Username

Remember me

Password

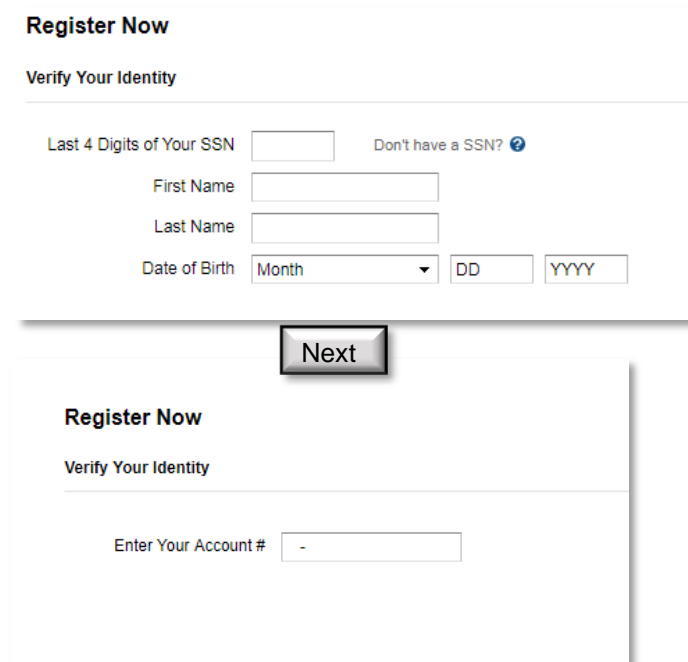
[Forgot Password?](#) [Register](#)

Please review our browser support information.

Having an issue logging in with a Safari browser? [Click here.](#)

By signing in, you consent to the use of cookies as described in the [Privacy Policy](#).

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



Register Now

Verify Your Identity

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

First Name

Last Name

Date of Birth

Register Now

Verify Your Identity

Enter Your Account #

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:

Register Now

✓ Verify Your Identity | ➔ Register | Confirmation

Create New Password

Retype New Password

Password Strength: Weak

Password Guidelines
Your password **must** be 6-20 characters and include 3 of the following:

- Number
- Special character
- Capital letter
- Lowercase letter

Note: You may not reuse a previous password.
What is a strong password?
To create a strong password, Fidelity recommends your password include the following:

- At least one special character: % ' () + , . - / : ; = ? \ ^ _ | ~ ! \$ @
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g. Social Security Number, telephone number, or date of birth)

Example of a strong password:
KingHenryThe8%^{

Create Your Security Question
If you need to reset your password, you will be asked your security question to verify your identity.

Security Question

Answer

Re-enter Answer

Next

Register Now

✓ Verify Your Identity | ✓ Register | ➔ Confirmation

Your registration was successful.

User ID 6 1

Note: Please record your User ID for future use. You will be required to enter this User ID and your password every time you log in to your account.

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:

Mobile App

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:

Confirmations, Prospectus, Statements & Tax Documents

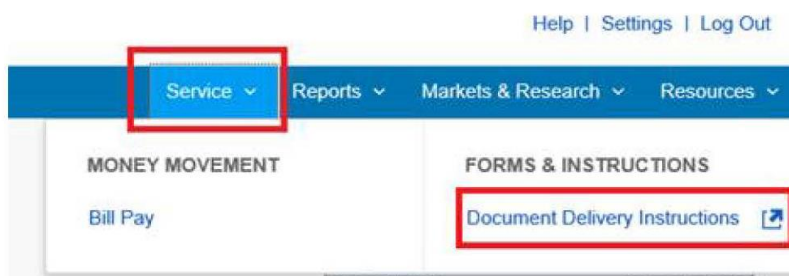
- Once you log in, you should **Go Paperless**

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		<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 type="radio"/> Electronic Delivery	<input checked="" type="radio"/> 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:

User ID

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

Customize Your Username for Sign In

You can create a custom username to sign into Wealthscape Investor and Wealthscape Mobile App. Once you create a custom username, you must sign in using the new Wealthscape Investor Login page; Mobile App users must download and sign in using the new Wealthscape Investor App.

Note: You will not be able to sign into the legacy myStreetscape Login page or Mobile App using a custom username.

Select **User Preferences > Change Username**.

Help | **User Preferences** | Contact Us | Sign Out

Refer to the on-screen Guidelines when choosing a name. After you enter your username, select **Check Availability**.

Enter your password and select **Next** (not shown). Select **Continue to Home Page** to return to the Home Page.

806816.3.0

Don't show me this again

Change Your Username

✓ Verify Your Identity | → **Create New Username** | Confirmation

Create Your New Username

All fields are required.

Enter New Username

Check Availability

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 personal information such as your Social Security number, or date of birth. Instead, use Jane212Smith
- Do not use 5 or more instances of a letter or easily recognized sequences (e.g., 11111)
- Do not use symbols, punctuation marks, or spaces

Close

Layout

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

MMF Investor Services
 As of 04-05-2016 3:15:43 PM ET

Account Balances for **Individual (I)**

Positions | **Balances** | Activity & Orders | Documents | Profile

As of 04-05-2016 3:15:57 PM ET

Investment Accounts	
All Accounts	\$0.00
Individual (I)	\$0.00
Individual (I)	\$0.00
Individual (I)	\$0.00
Individual (I)	\$0.00
Individual (I)	\$0.00
Individual (I)	\$0.00
Individual (I)	\$0.00
Joint - With Rights of Survivorship (J)	\$0.00

Total Account Value		
	Recent	Change
Total Account Value	\$0.00	\$0.00 (0.00%)
Total Securities Market Value	\$0.00	\$0.00
Core Stocks/Fund (T)	\$0.00	\$0.00
Cash (T) CASH000000	\$0.00	-

Securities Market Value (MV)		
	Recent	Change
Total Securities Market Value	\$0.00	\$0.00 (0.00%)
Core Stocks/Fund (T)	\$0.00	\$0.00
Cash (T)	\$0.00	\$0.00

Available to Trade		
	Recent	Change
Settled Cash	\$0.00	\$0.00
Unsettled Cash Credit	\$0.00	\$0.00
Unsettled Cash Debit	\$0.00	\$0.00

Buying Power		
	Recent	Change
Cash Only	\$0.00	-

Available to Withdraw		
	Recent	Change
Cash Only	\$0.00	\$0.00

Option Balances		
	Recent	Change
Options in the Money	\$0.00	\$0.00
Cash Covered Put Reserve	\$0.00	\$0.00
Total Options Securities Market Value	\$0.00	\$0.00 (0.00%)
Cash (1) Options	\$0.00	\$0.00
Margin (2) Options	\$0.00	\$0.00

Restricted Securities		
	Recent	Change
Non-Usable Securities Market Value ¹	\$0.00	\$0.00
Usable Securities Market Value ²	\$0.00	\$0.00

1. Non-Usable shares are not included in Margin (2) Securities Market Value but are included in the Total Account Value.
 2. Usable shares are included in Margin (2) Securities Market Value as well as the Total Account Value.
 Recent values are calculated using delayed prices (15 minutes) for the underlying securities. In certain cases where delayed prices are unavailable, closing price is used.

Important Account Balances Information

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



Forgot/Reset Password

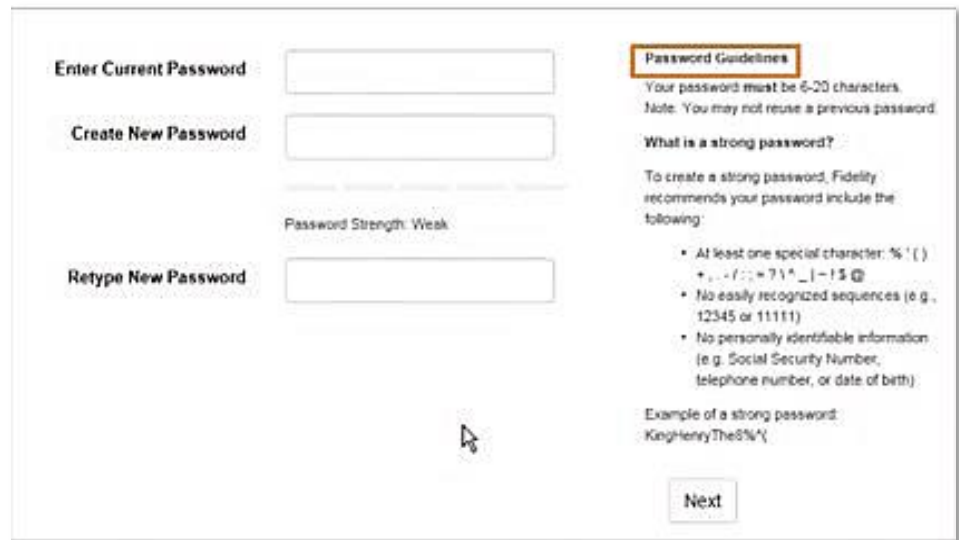
✓ Enter Your User ID | **Answer Your Security Question** | Create New Password | Finish

What is the name of your best friend from high school?

**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**



Enter Current Password:

Create New Password:

Retype New Password:

Password Strength: Weak

Password Guidelines

Your password must be 6-20 characters.
Note: You may not reuse a previous password.

What is a strong password?

To create a strong password, Fidelity recommends your password include the following:

- At least one special character: % ' () + , . - / : ; = ? ! ^ _ | - ! \$ @
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g. Social Security Number, telephone number, or date of birth)

Example of a strong password:
KingHenryThe8%*\

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

The screenshot displays the Wealthscape Investor web application interface. The top navigation bar includes "Wealthscape Investor" on the left and "Help | Settings | Contact Us | Log Out" on the right. Below the navigation bar, there are tabs for "Accounts" (highlighted with a red arrow), "Service", and "Markets & Research".

The main content area is divided into several sections:

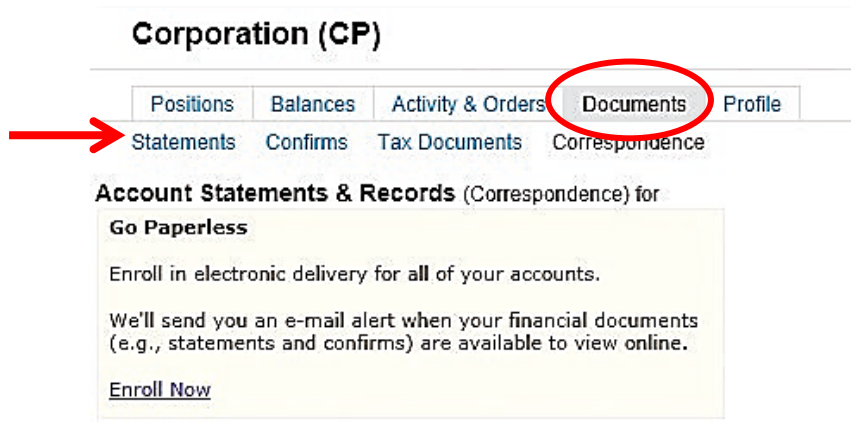
- Accounts:** A sidebar on the left shows "All Accounts" with a total balance of **\$90.21**. Below this, "Investment Accounts" and "Individual (I)" are listed, both showing a balance of \$90.21. A specific account ID "D48-003097" is also visible, along with a "Day Chg. \$0.00 (0.00%)" indicator.
- Portfolio Summary:** The main section on the left, titled "Portfolio Summary", includes a "Messages" section with a notification about enrolling in electronic delivery, and a "Latest Market News" section with three news items from Dow Jones Newswires regarding Treasury yields and home sales.
- Major Market Indices:** A section on the right titled "Major Market Indices" shows the current values and changes for the DJIA (21,537.29, -42.78, -0.20%), NASDAQ (6,391.42, +3.66, +0.06%), and S&P 500 (2,468.49, -4.05, -0.16%). It also includes a line chart for the DJIA performance over the day and a "52 Week Range" bar chart.
- Market Diaries:** A section at the bottom right titled "Market Diaries" allows users to "Select an Exchange" (currently set to NYSE) and view data "By Contract".

At the bottom of the page, there is a "Quick Quote" section with an "Enter Symbol" input field and a "Go" button. The footer contains "Terms of Use | Privacy | Security | Margin & Online Usage | © 1998-2017 FMR LLC. All rights reserved."

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

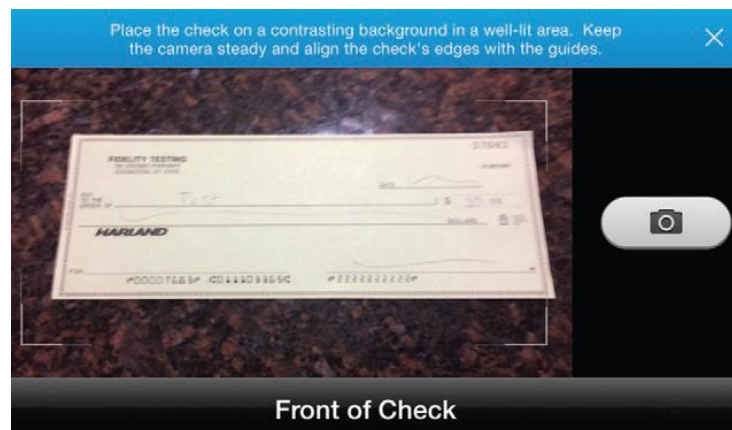


Deposit Checks:

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

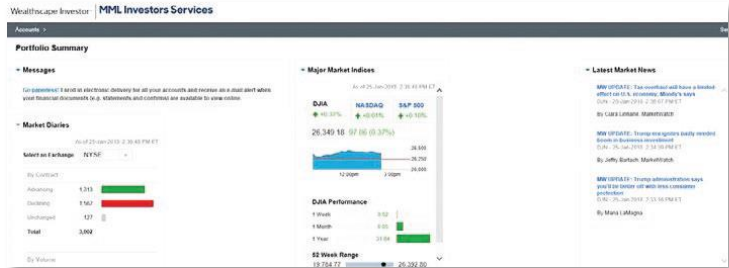
The deposit is immediately sent to NFS for review and approval, transmitted to the bank for processing and posted to the brokerage account. Deposits submitted on a business day prior to 4 p.m. ET and in good order will be posted the same business day.



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, 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

