

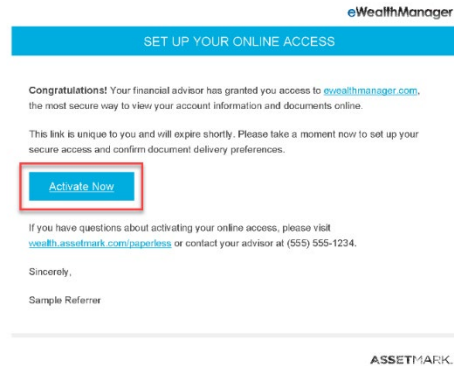
## eWealthManager

Request an invitation link from your financial planner.

Activate the email link.

Check your email inbox or spam folder for a message from [notifications@assetmark.com](mailto:notifications@assetmark.com). This email invitation is the key to accessing AssetMark's online Investor Portal in [eWealthManager.com](https://eWealthManager.com).

Click **Activate Now** to create your online profile.



### Set up your online profile

To set up your profile, **enter the last 4 digits of your Social Security Number/Tax ID.**

Alternatively, enter your 8-digit AssetMark Trust account number, which expanded to 8 digits in November 2021. To obtain your 8-digit account number, contact your Financial Advisor or refer to any statement dated December 2021 or after.

Make sure you set up your online profile within 21 days of receiving the email.

**Lost your invite?** Contact your Financial Advisor and ask for another email invitation to be sent.

### Set up multifactor authentication (MFA)

After you log into eWealthManager for the first time, you will be prompted to set up MFA if you haven't already done so. Select **Set Up** underneath either SMS, Voice Call, or Email to complete authentication.

## Set up a new personal security question

Click on the **drop-down arrow** and select a new personal security question for password recovery.

## Complete Your Password Recovery Setup

Choose a forgot password question.

What street did you grow up on? ▼

What street did you grow up on?  
What is your father's middle name?  
What was your first pet's name?  
What is your mother's maiden name?  
What was the name of your high school?  
Where did you meet your spouse?  
What is your favorite sport?  
What is your favorite film?  
What city were you born in?

## Select your eDelivery preferences

After you log in the first time, a pop-up will appear asking you to confirm your delivery preferences.

To enroll in eDelivery for all AssetMark Trust documents, select **Go Paperless**. No further action is needed. Partner Custodian clients can select their preferences by navigating to **eWealthManager > Documents > Delivery Preferences**.

### Delivery Preferences

Stay Secure, Go Green, Go Paperless

Your statements, tax packages, and shareholder materials will be available online and a notification will be sent to the email address on file.

By Clicking "GO PAPERLESS", you agree that:

- You have read and agree to these eDelivery Terms and Conditions.
- Your computer satisfies the hardware and software requirements specified in the eDelivery Terms and Conditions.
- You can access this Sample Statement
- You give your affirmative consent to receive electronically those Documents you selected

Note: When you save preferences you will no longer receive hardcopy Documents through the mail which you have selected email delivery.

I Accept Terms & Conditions → **GO PAPERLESS** [Modify Preferences](#)

To un-enroll in eDelivery for one or more documents, select **Modify Preferences**. A pop-up will then appear asking you to change delivery method and **Save Preferences**.

### Delivery Preferences

Document Type	Current Delivery Method	Change Method
ASSETMARK TRUST ONLY		
Statement & Correspondence	eDelivery Accepted	Electronic ▼
Tax Packages	eDelivery Accepted	Electronic ▼
Shareholder Materials	eDelivery Accepted	Electronic ▼

By Clicking "Save Preferences", you agree that:

- You have read and agree to these eDelivery Terms and Conditions.
- Your computer satisfies the hardware and software requirements specified in the eDelivery Terms and Conditions.
- You can access this Sample Statement
- You give your affirmative consent to receive electronically those Documents you selected.

Note: When you save preferences you will no longer receive hardcopy Documents through the mail which you have selected email delivery.

I Accept Terms & Conditions → **Save Preferences**

## View your account documents online

You can view 2+ years of account documents online anytime, anywhere right in the **Document Vault**.

Welcome Sample Client  
Viewed Financial Advisor Firm  
[Preferences](#) - [Contact Us](#) - [Logout](#) - [Switch ID](#)

Sample Client \$1,166,721.46  
COMBINED ACCOUNTS

[Accounts](#) [Performance](#) **[Document Vault](#)** [Client Information](#) [Investments](#) [Investment History](#) [Gain/Loss](#)

Portfolio Performance

<b>4.73%</b> Annualized Since Inception - 1/6/2009 as of 6/21/2022	<b>-6.85%</b> Month to Date as of 6/21/2022	<b>-16.38%</b> Year to Date as of 6/21/2022
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