eQUIPT CLIENT PORTAL GUIDE

Accessing and using the features of eQuipt: Statements and Tax Forms, eDelivery and Linking Account Views via the eQuipt Client Portal

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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.

You will need to establish site access credentials.

User Name: ____

Password: ____

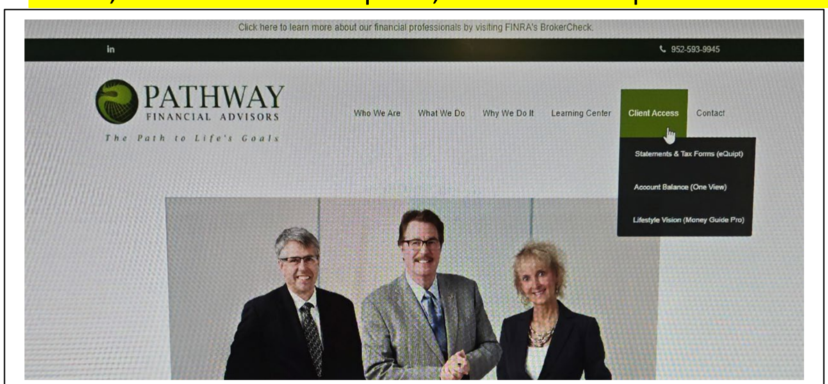
We recommend that you retain this guide for future reference.

If you have chosen to retain your credentials on this document, please retain it in a secure location.

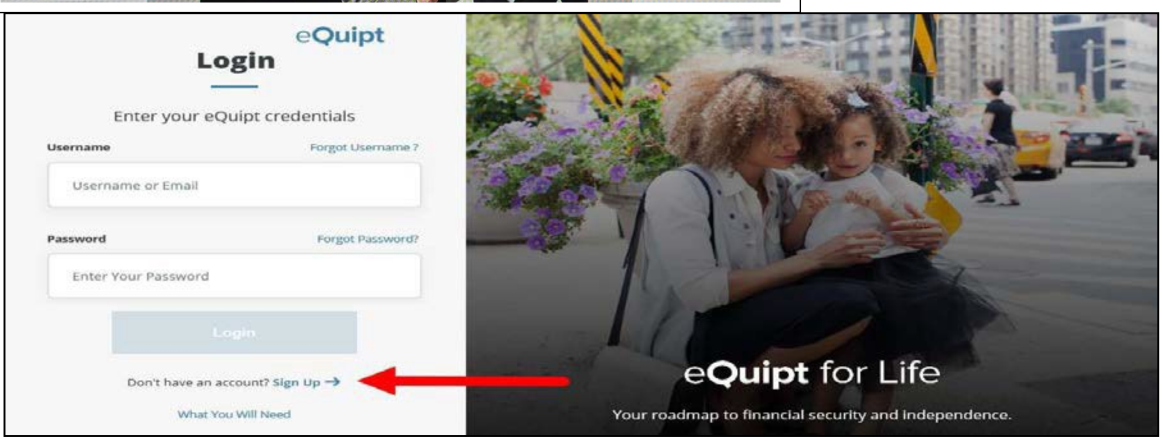
Enrolling Instructions

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.



<u>Client Access Tab: Select Statements & Tax Forms</u>



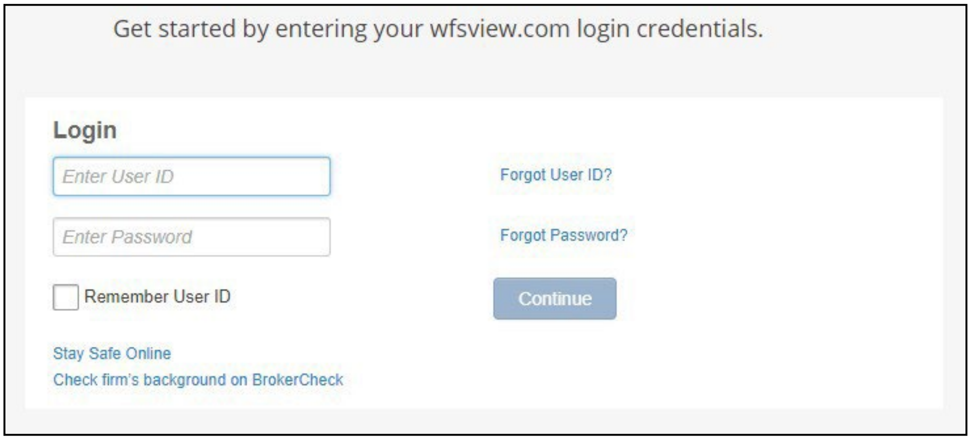
You will now be presented with a Yes/No question asking "*Do you have a NetXInvestor in for wfsview.com*?". NetXInvestor (www.wfsview.com) was our previous site, prior to the release of the new eQuipt Client Portal

- If you have been using NetXInvestor to access your accounts, select Yes and then click Continue. See page 3. 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 4.

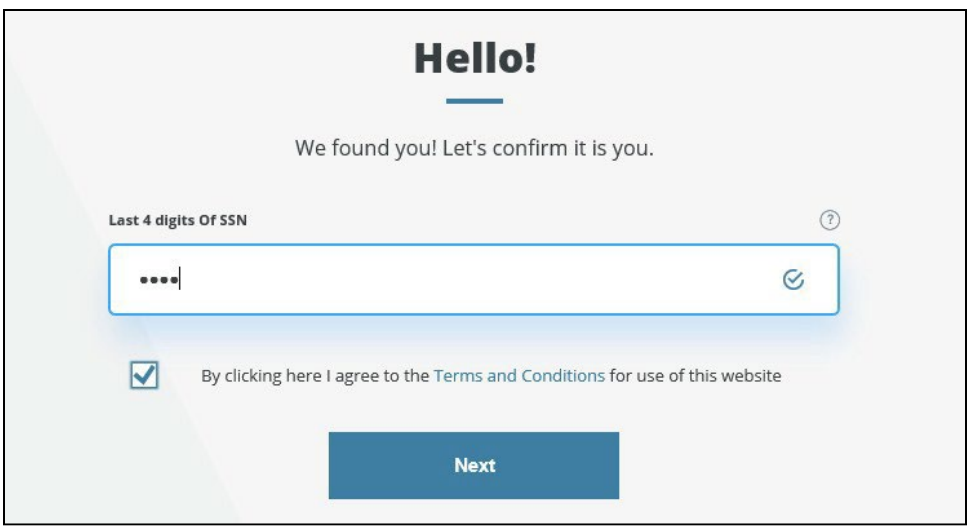
Enrollment for NetXInvestor Users

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.

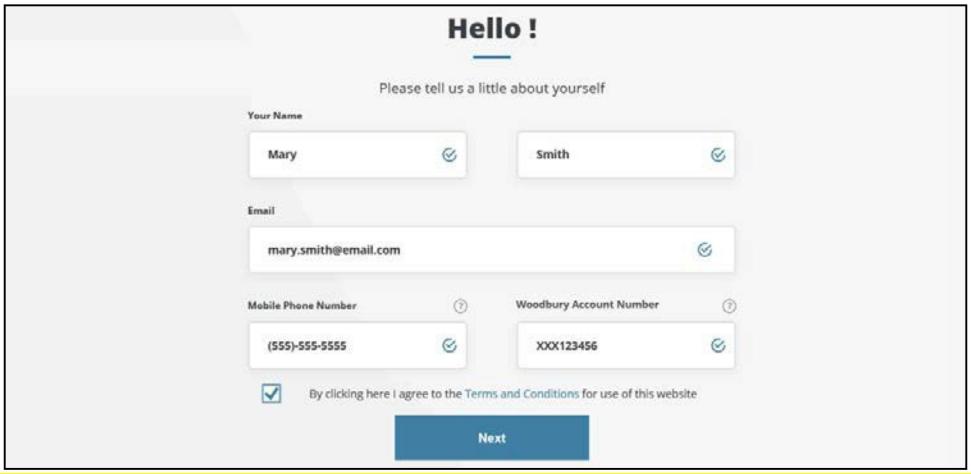


3. Provide your *Email* and *Mobile Phone Number* (used in case you need assistance in logging in) and click Next to continue.
4. Create your new eQuipt *Username* and *Password*. The username will default to your email address, but can be changed. The password must be at least 8 characters and contain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

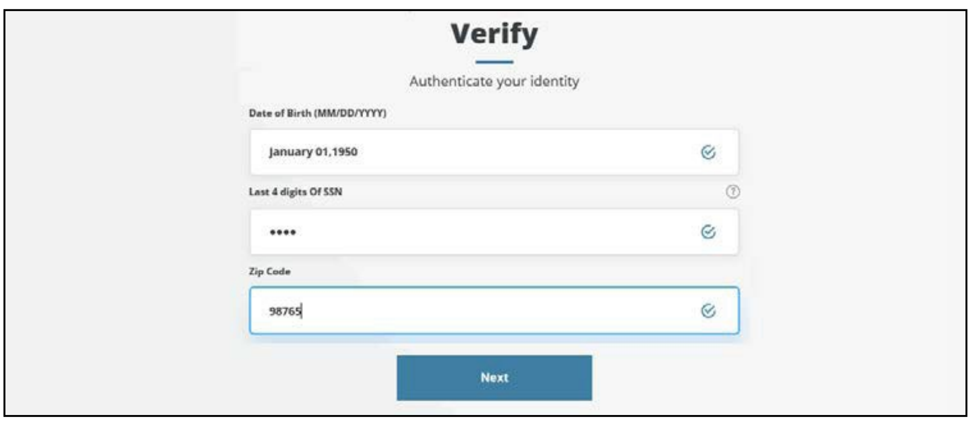
Enrollment for New Users

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*. Mark the checkbox to accept the *Terms and Conditions* and click 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.

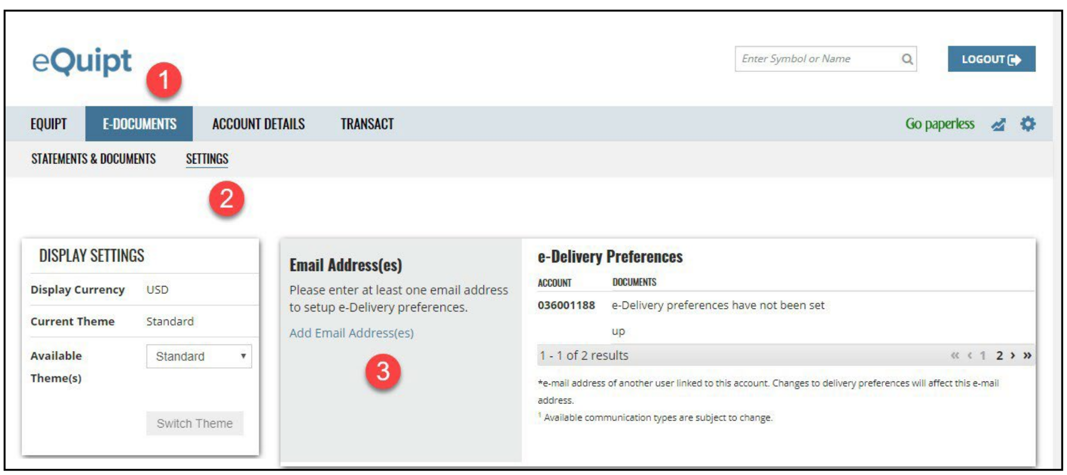


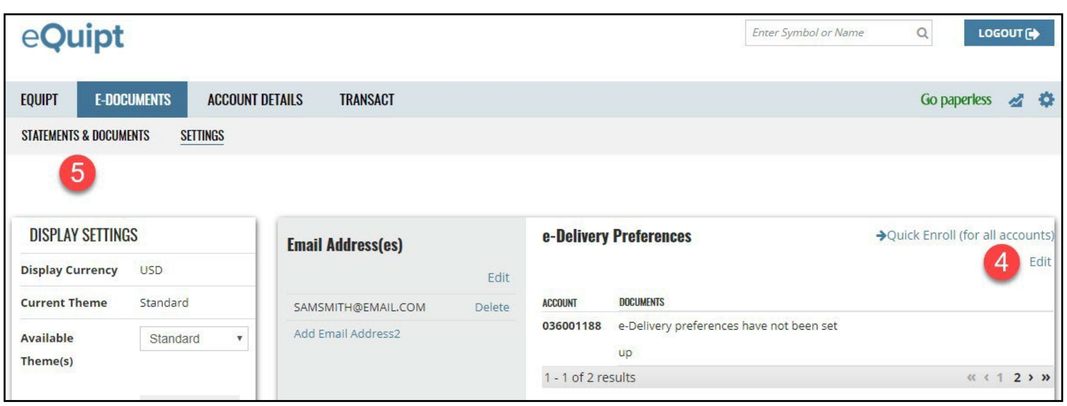
3. On the last page create your new eQuipt Client Portal *Username* and *Password*. The username will default to your email address, but can be changed. The password must be at least 8 characters and contain at least 1 number, 1 letter, and 1 special character. Click Next to compete the enrollment process.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

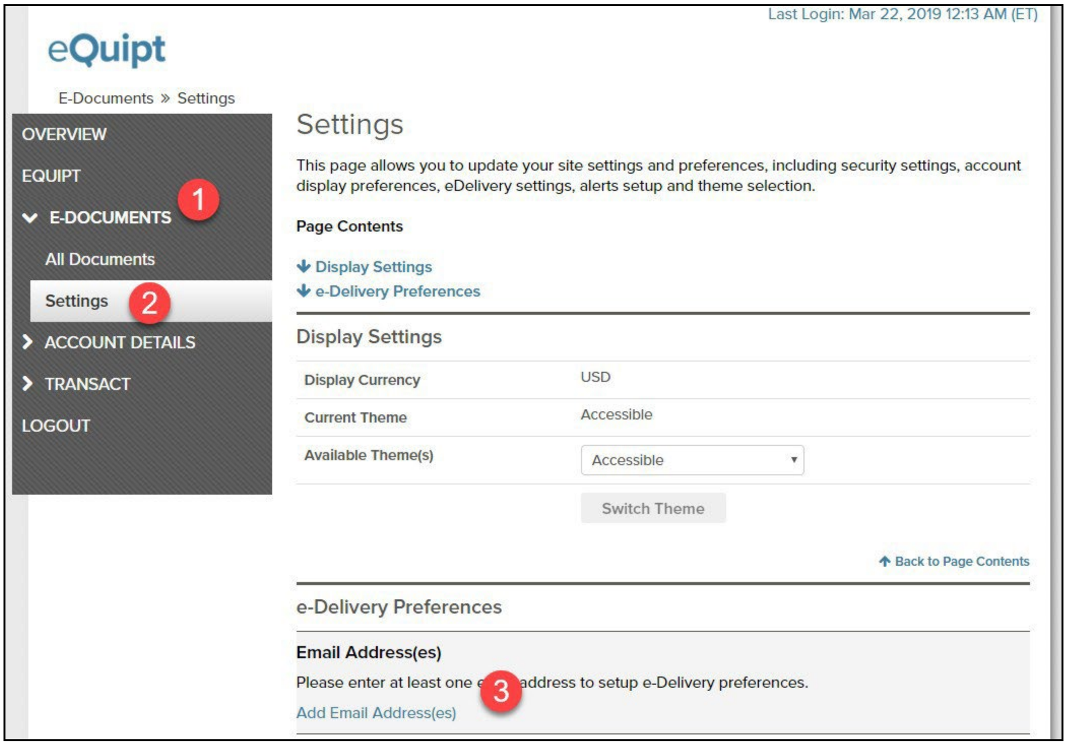
eDelivery Preferences

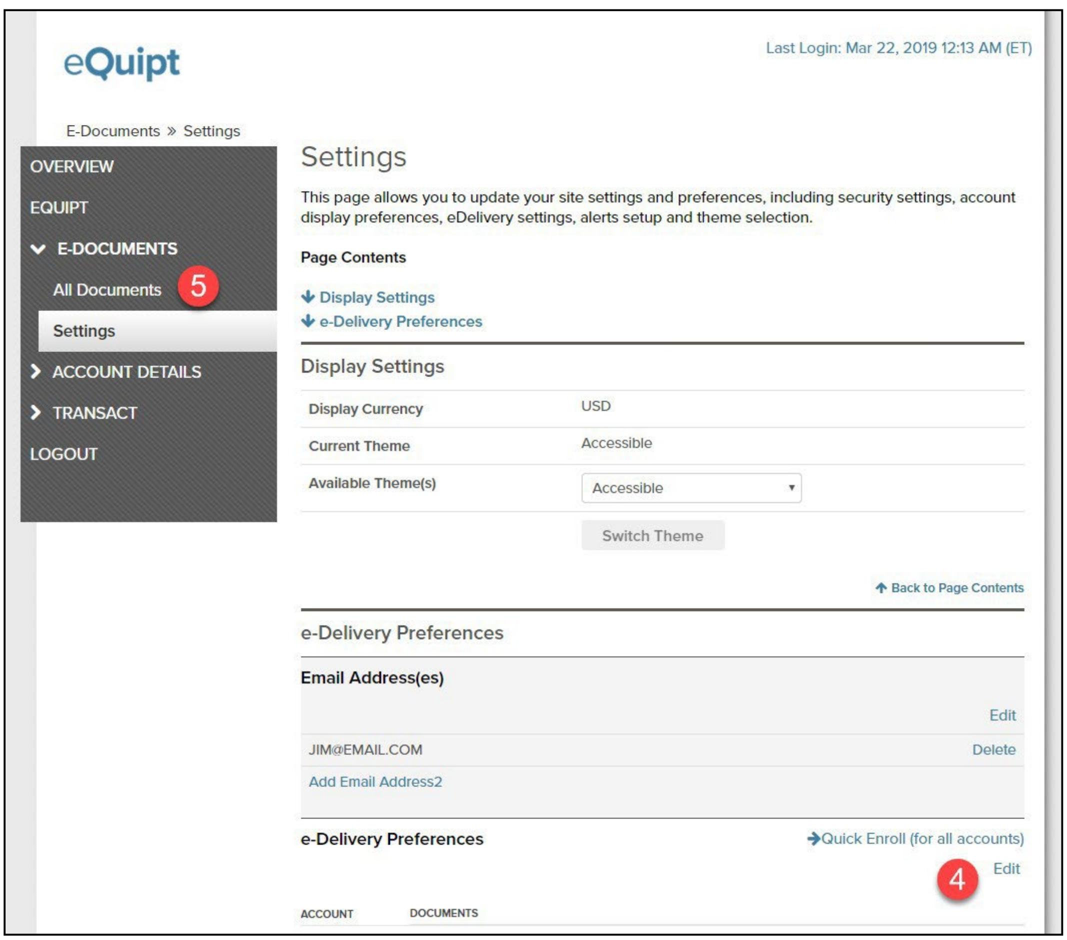
You have the option of receiving account communications (e.g., statements, trade confirmations, tax documents, etc.) electronically rather than in paper. To view/change your eDelivery preferences, complete the following steps (shown for both standard and Accessible themes):

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.



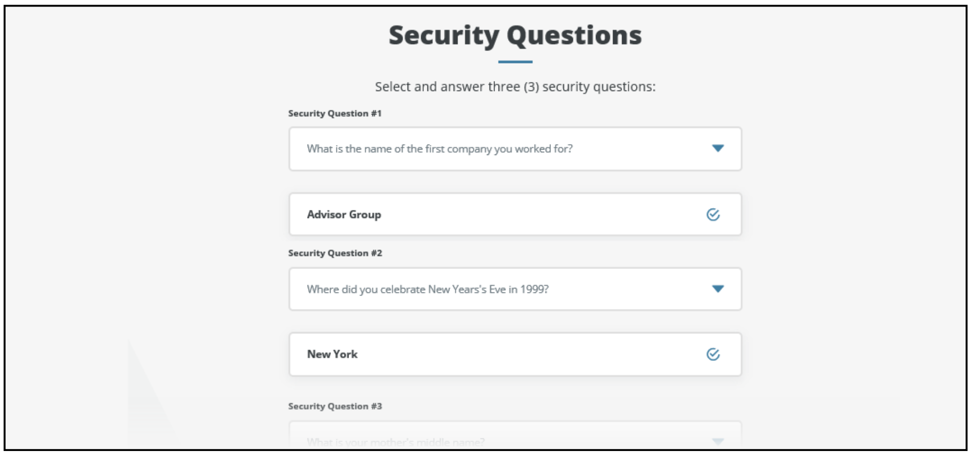



Last Login: Mar 22, 2019 12:13 AM (ET)
eQuipt
E-Documents » Settings
OVERVIEW
EQUIPT
E-DOCUMENTS
1
All Documents
Settings
2
ACCOUNT DETAILS
TRANSACT
LOGOUT
Settings
This page allows you to update your site settings and preferences, including security settings, account display preferences, eDelivery settings, 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 e address to setup e-Delivery preferences.
3
Add Email Address(es)

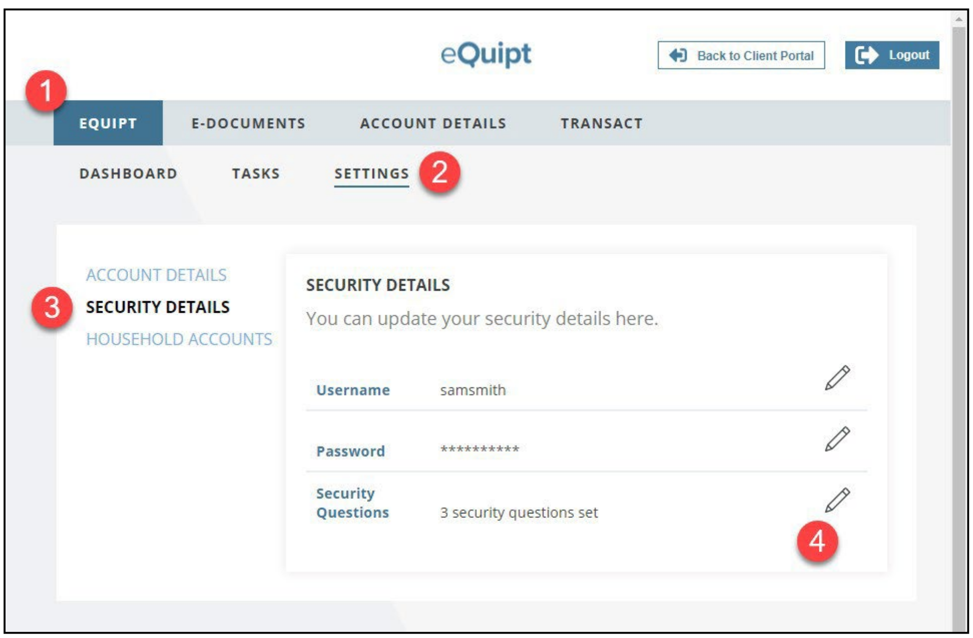

eQuipt
Last Login: Mar 22, 2019 12:13 AM (ET)
E-Documents » Settings
OVERVIEW
EQUIPT
E-DOCUMENTS
All Documents
5
Settings
ACCOUNT DETAILS
TRANSACT
LOGOUT
Settings
This page allows you to update your site settings and preferences, including security settings, account display preferences, eDelivery settings, 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)
Edit
JIM@EMAIL.COM
Delete
Add Email Address2
e-Delivery Preferences
Quick Enroll (for all accounts)
Edit
4
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

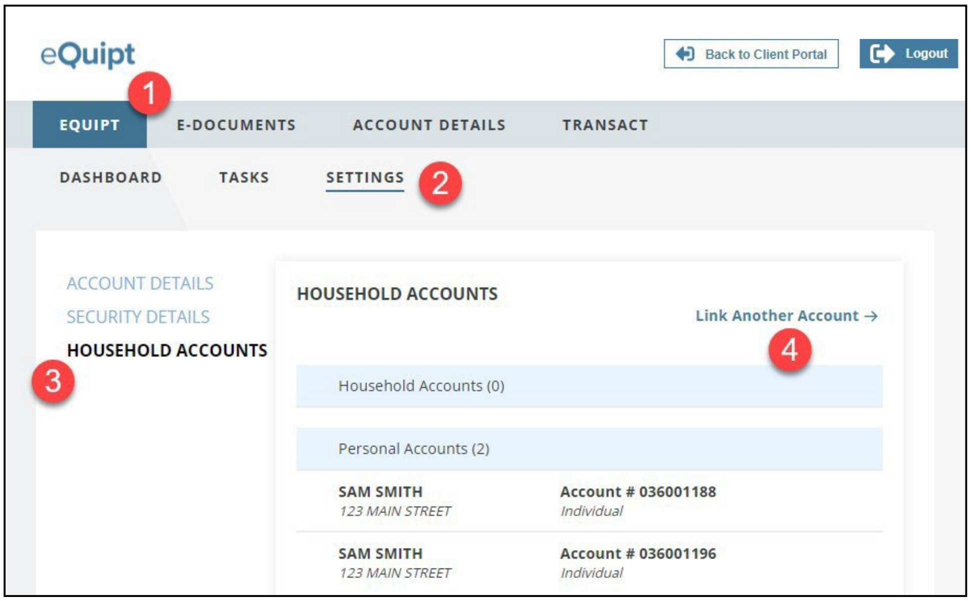
2. Select Settings

3. Select Security Details

4. Click the pencil icon next to Security Questions

Householding Multiple Accounts

By establishing a single login using the instructions below, you will have access to all your accounts as well for people in your household (e.g., spouse, partner, children, etc.). Note: Accounts for entities (trusts, businesses, etc.) can only be linked by sending a written request to your advisor.



1. Click the eQuipt tab

2. Select Settings

3. Select Household Accounts

4. Click Link Another Account

At 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.