



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

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.

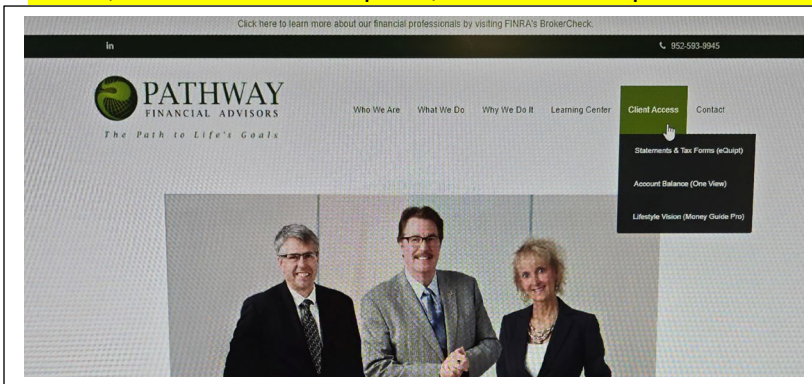
If you have chosen to retain your credentials on this document, please retain it in a secure location.



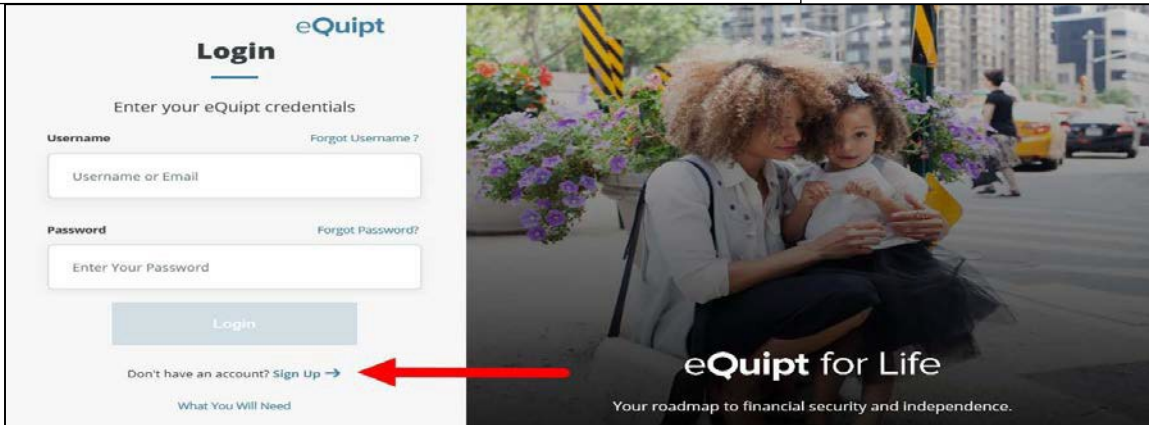
Enrolling Instructions

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.



Client Access Tab: Select Statements & Tax Forms



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

Get started by entering your wfsview.com login credentials.

Login

[Forgot User ID?](#)

[Forgot Password?](#)

Remember User ID

[Stay Safe Online](#)
Check firm's background on BrokerCheck

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.

Hello!

We found you! Let's confirm it is you.

Last 4 digits Of SSN ?

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

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

The screenshot shows a web form titled "Hello!" with the instruction "Please tell us a little about yourself". It contains several input fields: "Your Name" with two fields containing "Mary" and "Smith"; "Email" with the field "mary.smith@email.com"; "Mobile Phone Number" with the field "(555)-555-5555"; and "Woodbury Account Number" with the field "XXX123456". Below these fields is a checked checkbox with the text "By clicking here I agree to the Terms and Conditions for use of this website". A blue "Next" button is at the bottom.

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.

The screenshot shows a web form titled "Verify" with the instruction "Authenticate your identity". It contains three input fields: "Date of Birth (MM/DD/YYYY)" with the field "January 01, 1950"; "Last 4 digits Of SSN" with the field "****"; and "Zip Code" with the field "98765". A blue "Next" button is at the bottom.

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 (marked with a red circle '1'). Below it is a navigation bar with tabs: EQUIPT, E-DOCUMENTS (selected), ACCOUNT DETAILS, and TRANSACT. To the right of the navigation bar are 'Go paperless', a share icon, and a settings gear icon. Below the navigation bar are sub-tabs: STATEMENTS & DOCUMENTS and SETTINGS (marked with a red circle '2'). The main content area is divided into three columns. The left column is 'DISPLAY SETTINGS' with fields for 'Display Currency' (USD), 'Current Theme' (Standard), and 'Available Theme(s)' (Standard). The middle column is 'Email Address(es)' with a prompt to enter an email address and a link 'Add Email Address(es)' (marked with a red circle '3'). The right column is 'e-Delivery Preferences' with a table showing account 036001188 and the message 'e-Delivery preferences have not been set'. Below the table is a pagination bar '1 - 1 of 2 results' and a 'Quick Enroll' link.

This screenshot is similar to the previous one but shows the 'Quick Enroll' link in the 'e-Delivery Preferences' section (marked with a red circle '4'). Additionally, the 'STATEMENTS & DOCUMENTS' sub-tab is now selected (marked with a red circle '5'), and the 'Email Address(es)' section now shows an email address 'SAMSMITH@EMAIL.COM' with 'Edit' and 'Delete' options.



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\(es\)](#)

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

eQuipt

E-Documents » Settings

OVERVIEW

EQUIPT

▼ E-DOCUMENTS

All Documents **5**

Settings

► ACCOUNT DETAILS

► TRANSACT

LOGOUT

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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	

[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

Select and answer three (3) security questions:

Security Question #1

What is the name of the first company you worked for?

Advisor Group

Security Question #2

Where did you celebrate New Year's Eve in 1999?

New York

Security Question #3

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

The screenshot shows the eQuipt Client Portal interface. At the top, there are navigation tabs: EQUIPT, E-DOCUMENTS, ACCOUNT DETAILS, and TRANSACT. Below these are sub-tabs: DASHBOARD, TASKS, and SETTINGS. The SETTINGS tab is selected. On the left sidebar, there are links for ACCOUNT DETAILS, SECURITY DETAILS, and HOUSEHOLD ACCOUNTS. The SECURITY DETAILS link is selected. The main content area shows the SECURITY DETAILS page with the text "You can update your security details here." Below this are three rows of information: Username (samsmith), Password (*****), and Security Questions (3 security questions set). Each row has a pencil icon to its right, indicating it can be edited. Red numbered callouts (1-4) highlight the steps: 1. Click the eQuipt tab, 2. Select Settings, 3. Select Security Details, and 4. Click the pencil icon next to Security Questions.

1. Click the eQuipt tab

2. Select Settings

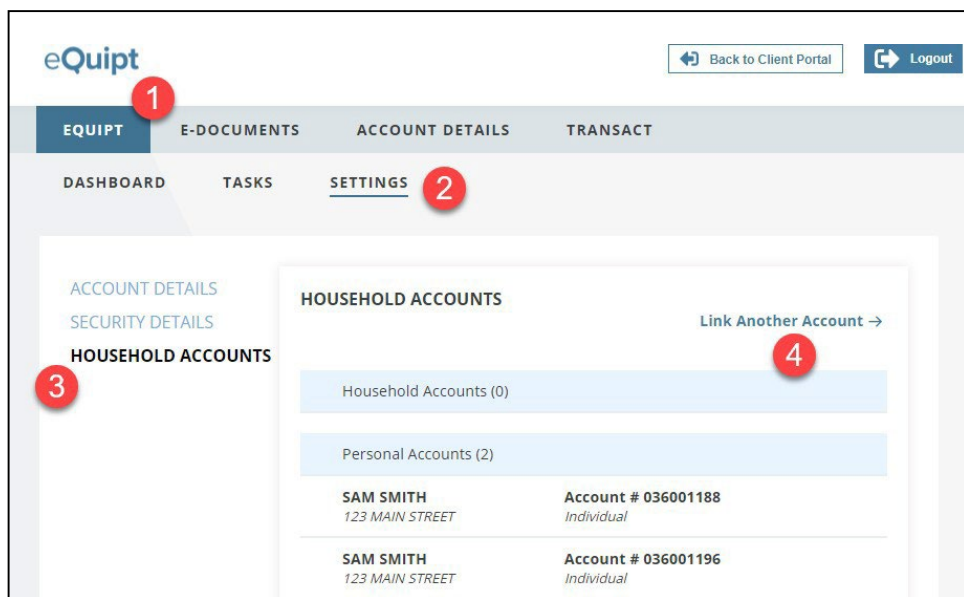
3. Select Security Details

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.