

Wealthscape Mobile App Functionality

The Wealthscape Mobile Application (App), which is available for iPhone®, iPad®, and Android™, can potentially help MMLIS financial professionals save time, work efficiently, and enhance the service you provide to your clients.

Please refer to the [Wealthscape Supported Browser List](#) for information on the currently supported browsers and operating systems.

WEALTHSCAPE MOBILE APP FUNCTIONALITY

| Functionality | iPhone | Android | iPad |
|--|--------|---------|------|
| Account/Client Snapshot | | | ✓ |
| Account History, Detail | ✓ | ✓ | ✓ |
| Account Positions, Detail | ✓ | ✓ | ✓ |
| Account Search | ✓ | ✓ | ✓ |
| Alert Center | ✓ | ✓ | ✓ |
| Balances | ✓ | ✓ | ✓ |
| Client History | | | ✓ |
| Client Positions | | | ✓ |
| Client Search | | | ✓ |
| Document Access | | | ✓ |
| Equity Trading | | | ✓ |
| Mutual Fund Trading | | | ✓ |
| Order Status, Detail | ✓ | ✓ | ✓ |
| Quotes, News, Charts | ✓ | ✓ | ✓ |
| Remote Check Deposit | ✓ | ✓ | ✓ |
| Suitability | ✓ | ✓ | ✓ |
| Top 5 Net Worth | ✓ | ✓ | ✓ |
| Trading from Quotes | | | ✓ |
| Watch List/Portfolio Watch | ✓ | ✓ | ✓ |
| Multi-factor (2 nd level) Authentication – Knowledge Based Authentication (KBA) challenge | ✓ | ✓ | ✓ |

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