

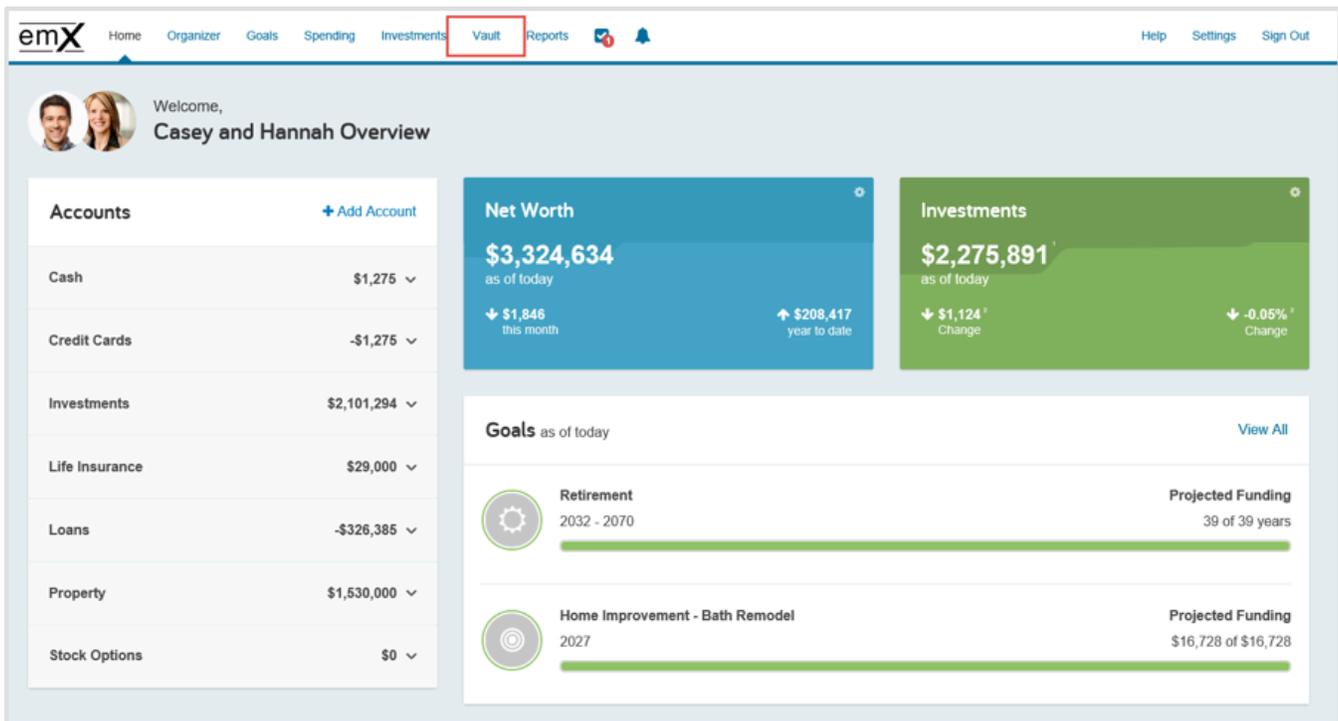
Using the Vault

MAXIMIZE YOUR WEALTH MANAGEMENT EXPERIENCE

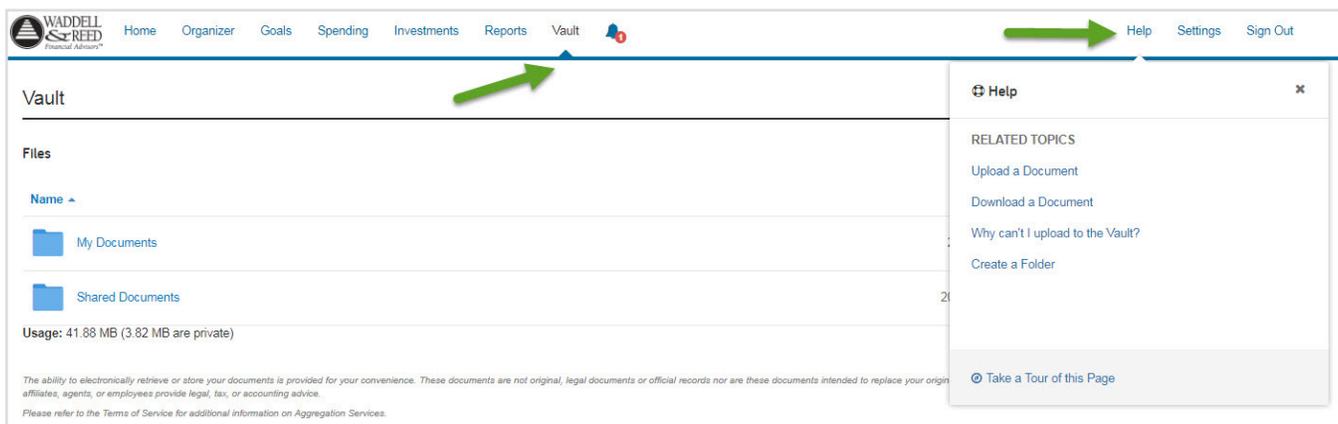


The Vault feature of your W&R Wealth Management Site allows you to safely and securely store important documents and files to help you simplify your financial life. This guide will show you how to upload files and organize them within the Vault, as well as how to do so on your mobile device.

1. To access the Vault, click the **Vault** tab on your W&R Wealth Management Site homepage.



Note: Your Wealth Management Site is equipped with internal support. If you need assistance, use the **Help** menu within the site. The **Help** topics will change as you navigate the Wealth Management Site. Support related to the Vault will be found once you choose the Vault menu.

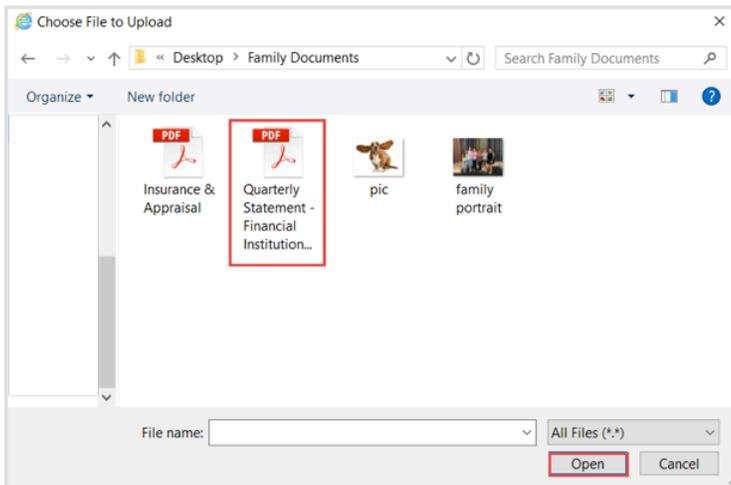
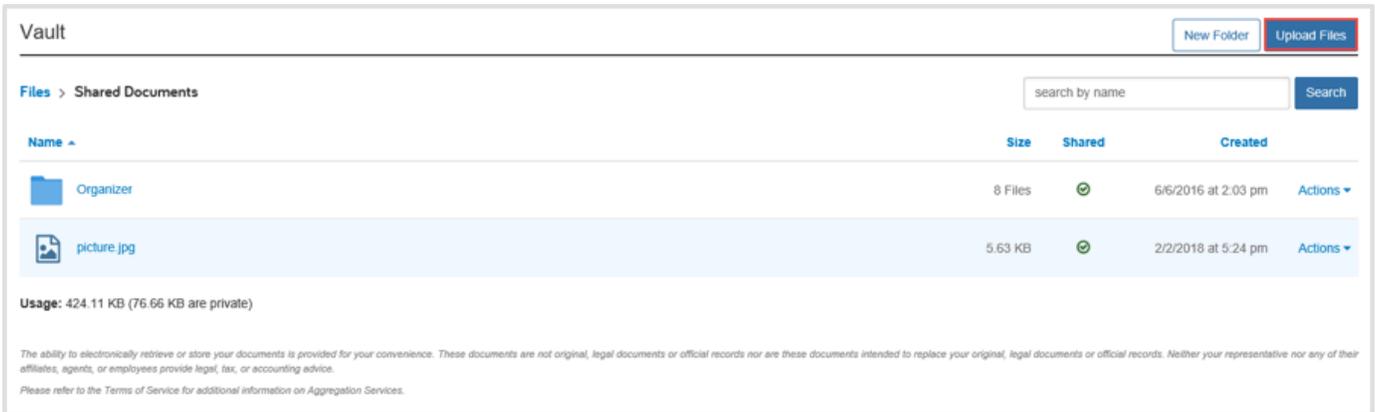


2. Although your financial advisor may create additional folders for you, every Vault contains two folders: **My Documents** and **Shared Documents**. **My Documents** can be used to store any personal files; your financial advisor does not have access to that folder. Documents uploaded to **Shared Documents** are viewable by your financial advisor.

Note: Most common file types are compatible with the Vault, however, .exe (executable) files are not supported. The individual file size limit is **30mb**.

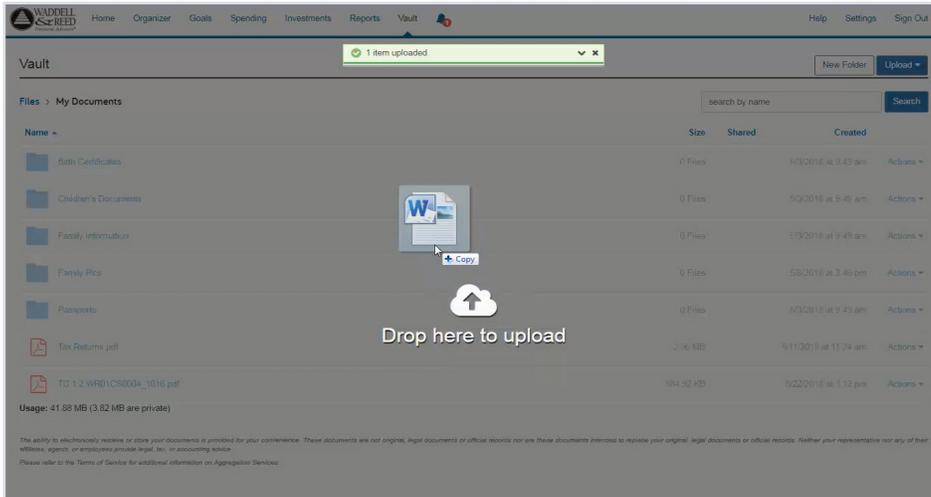


3. Click **Upload Files** to begin. Your browser will open a window that will allow you to choose which documents to upload. To select multiple files, hold down the SHIFT key while selecting the files individually.

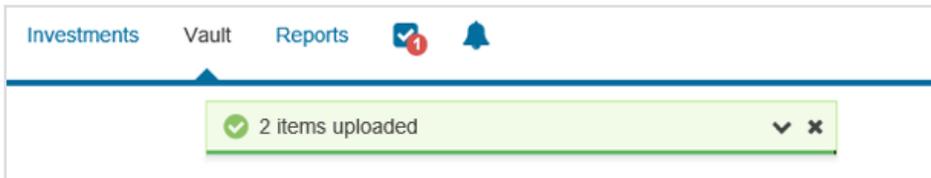


Reminder: Each individual file cannot exceed 30mb in size.

Note: Users can also drag and drop documents into Vault folders.

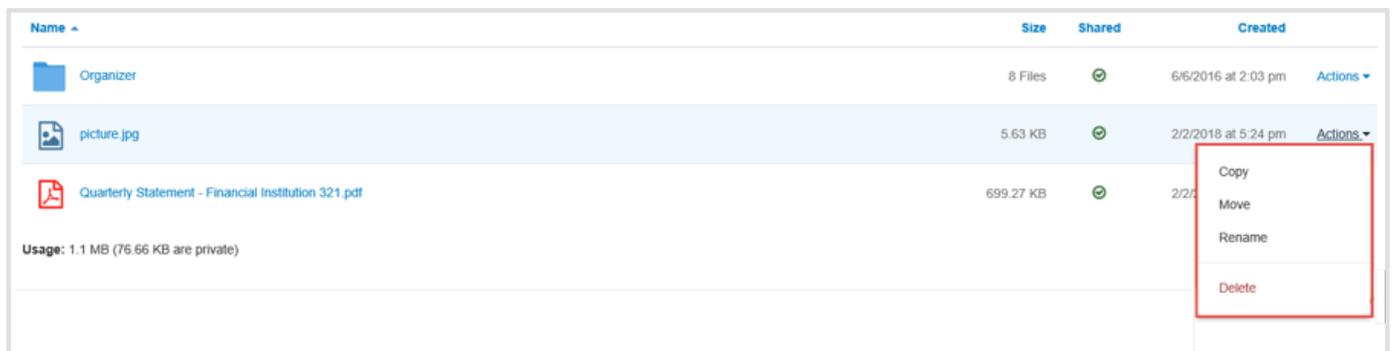


4. You will see a green success message at the top of your portal once files are successfully uploaded.

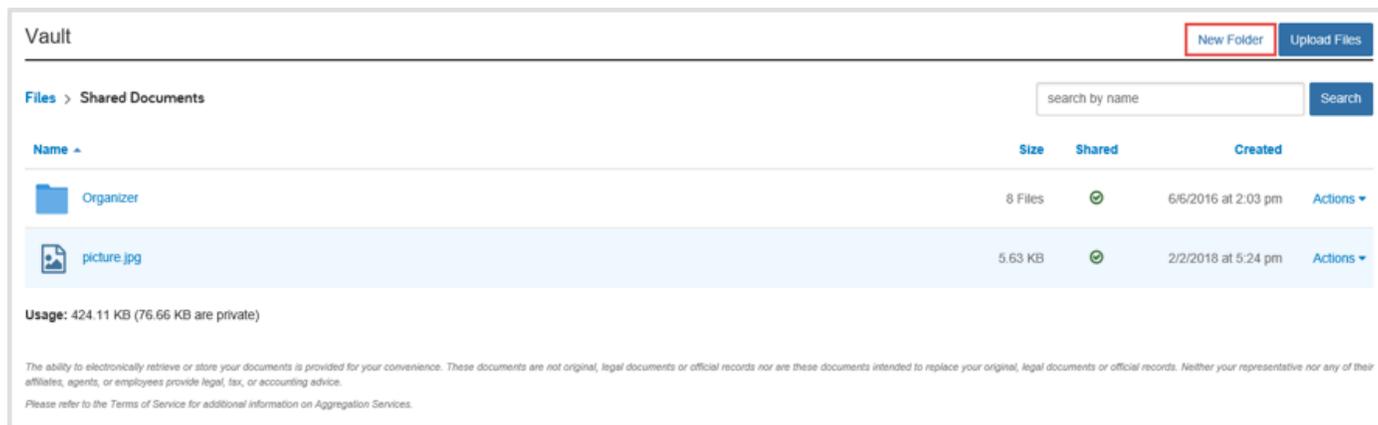


5. To open a document, click on the file's name. Each file in your Vault will have an **Actions** drop-down menu. This allows you to **copy** and **move** a file into a different folder or subfolder (within **My Documents** or **Shared Documents**) and **rename** or **delete** a file.

Note: Deleted files cannot be recovered.



6. Within both folders you will have the ability to create subfolders by clicking the **New Folder** button.

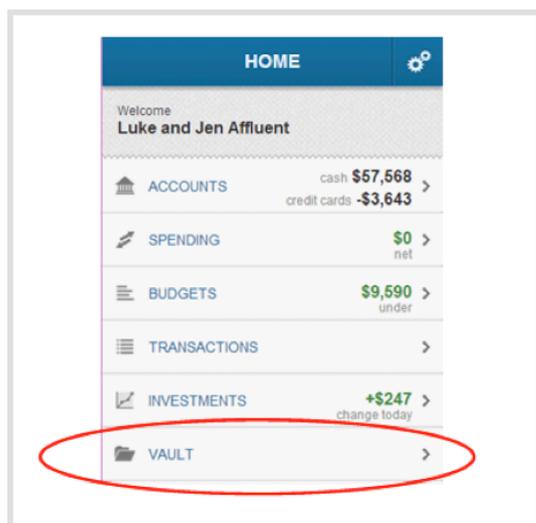


Mobile Access

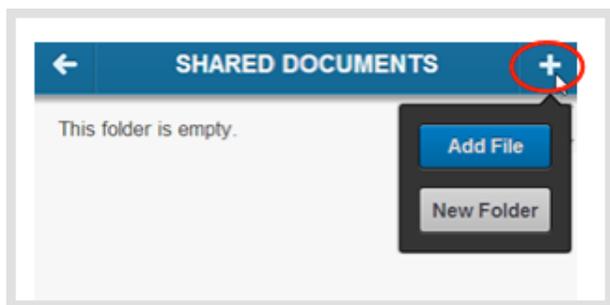
You can access the W&R Wealth Management Site from a mobile device, where you may also upload files or photos to the Vault.

Note: This functionality is currently limited to devices running iOS 6, 7 and later. Functionality on Androids may vary or not work depending on the version.

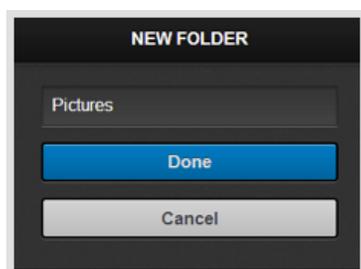
1. Sign into the mobile site and select **Vault** from your home screen.



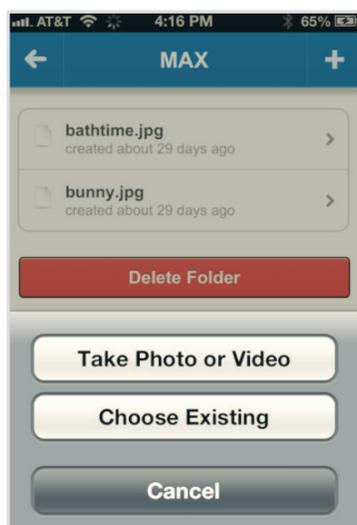
2. To add a new file or folder, click either the **My Documents** or **Shared Documents** folder and then the plus (+) sign.



3. When adding a new folder, give the folder a name and select **Done**. Click **Cancel** to return to the previous screen.



4. When adding a new file, you will have the option to take a photo/video of the document or upload an existing file from your phone's library. Rename the file if needed.



5. To delete a file, click on the document and a delete button will appear beneath it.

Contact your financial advisor for help with your W&R Wealth Management Site.

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