GUIDE

eQuipt Client Portal

Purpose / Abstract

The eQuipt Client Portal website enables you to view your investment accounts online, to establish eDelivery preferences for account communications (statements, confirms, tax documents, etc.), and to view market quote information and intra-day market activity for your accounts. This guide will demonstrate how to set up your access and will provide a basic navigation overview.

Contents

eQuipt Client Portal Features

- Provides 24/7 online access to your investment accounts to view balances, holdings, cost basis, activity, projected cash flow, order status, and account profile information

- Provides the ability to establish eDelivery preferences for account communications (statements, confirms, tax documents, etc.)

- Provides access to all of your investment accounts through a single login, and includes the ability to link household accounts as well

- Information is provided as of the previous business day's close as well as with intraday updates

Enrolling for eQuipt Client Portal

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 www.wfsequipt.com and click the **Sign Up** link (shown below). If your Advisor emailed you an enrollment invitation, simply click the **Click To Register** button in the email:
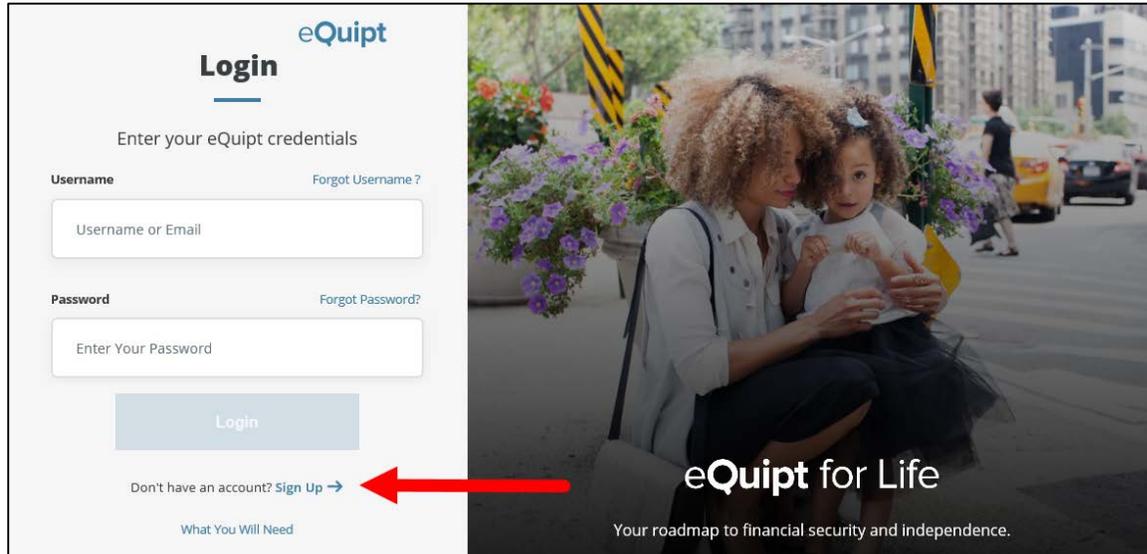
You will now be presented with a Yes/No question asking "*Do you have a NetXInvestor login for spfview.com*?". NetXInvestor (www.wfsview.com) was our previous site, prior to the release of eQuipt Client Portal (www.wfsequipt.com).

- If you have been using NetXInvestor to access your accounts, select **Yes** and then click **Continue.** See page 4. 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 5.

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

| Enter User ID | Forgot User ID? |
| Enter Password | Forgot Password? |

☐ Remember User ID   Continue

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

Next

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 update your browser bookmark to www.wfsequipt.com

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* (if you have multiple accounts you only need to input one; eQuipt Client Portal will automatically link all accounts for your SSN). 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 add eQuipt Client Portal to your browser's Favorites list- www.wfsequipt.com

eDelivery Preferences

You have the option of receiving account communications (e.g. statements, trade confirmations, tax documents, etc.) electronically rather than in paper. To receive electronic communications, you must first select eDelivery preferences in eQuipt Client Portal:

- If you **were** a previous NetXInvestor user, your eDelivery preferences will transfer from NetXInvestor into eQuipt, though you can update them at any time.

- If you **were not** a previous NetXInvestor, when you complete your eQuipt enrollment you will immediately be presented with the option to select eDelivery preferences. You can do so by selecting **Update Preferences**, or select **Remind Me Later** or **No Thanks**.
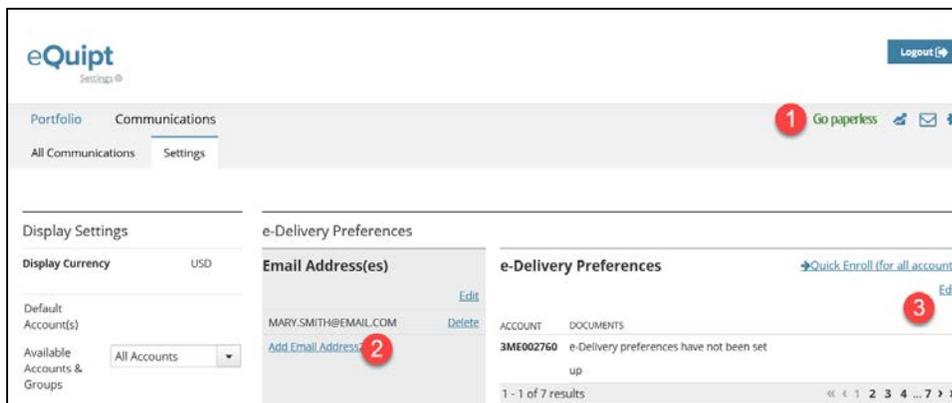
1. The eDelivery settings can also be accessed at any time by clicking the **Go Paperless** banner in the top right of the screen (#1 in screenshot above)

2. Click **Add Email Address(es)** to input up to 2 email addresses (#2 in screenshot above).

3. Click **Edit** in the eDelivery Preferences section of the screen (#3 in screenshot above) to select which communications should be sent electronically. If you have multiple accounts, you can utilize the **Quick Enroll** option instead to apply the same preferences to all accounts.

4. Account communications will display in the **Communications** tab (shown below). Note the filters on the left for Statements, Trade Confirmations, etc.
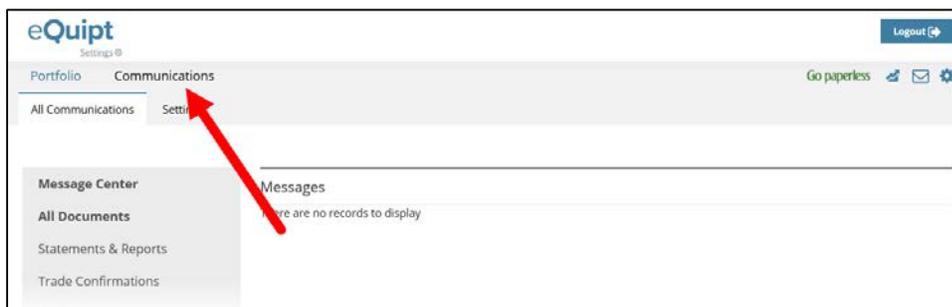
Security Questions

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 accessing the eQuipt Settings screen:

1. Click the **eQuipt** logo at the top of any screen (#1 in screenshot above)

2. Select the **Security** tab (#2 in screenshot above). This is also where you can update your username, password, emails, and phone numbers.

3. Once you have made your changes, click **Back to Client Portal** (#3 in screenshot above) to return to the eQuipt account screens.

Accessing Multiple Accounts

eQuipt Client Portal automatically provides you with access to all accounts established under your SSN, using a single login. Additional accounts in your household (spouse, children, trust, business, etc.) can be linked to your login as well:
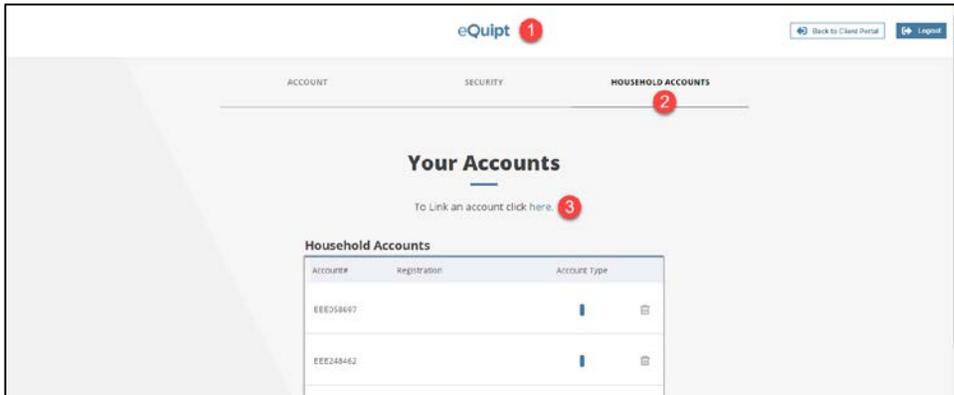

1. Click the **eQuipt** logo at the top of any screen (#1 in screenshot above)

2. Select the **Household Accounts** tab (#2 in screenshot above)

3. Click **To Link an account click here**. (#3 in screenshot above)

Next you will be asked to provide information about the account being linked (see below) including its *Woodbury Account Number, Last 4 digits of SSN, Date of Birth*, and *Zip Code*. Click the **Link** button to link the account.

Login Assistance

If you ever forget your username or password, note the **Forgot Username?** and **Forgot Password?** links on the eQuipt Client Portal login screen (www.wfsequipt.com):
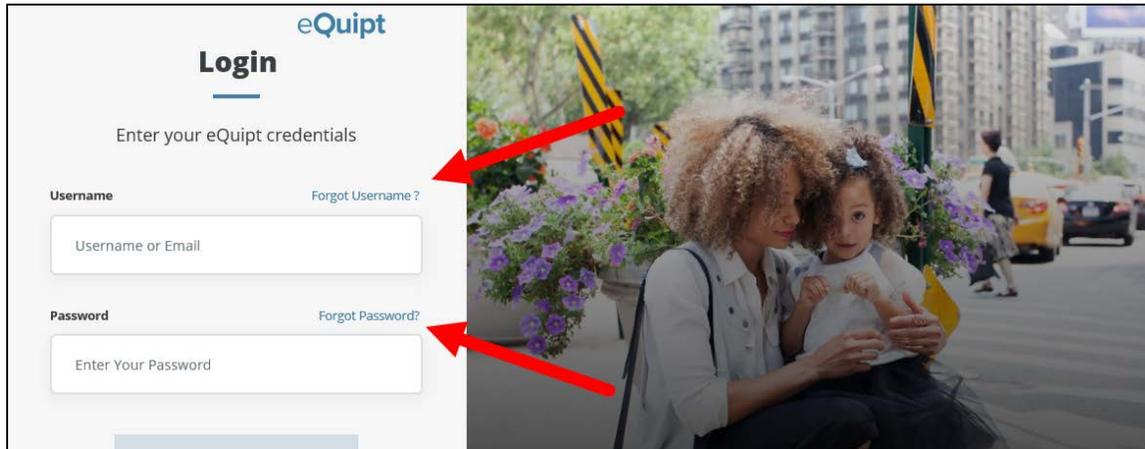

- *Forgot Username?*- simply input your email address and click **Next** to have the username emailed to you

- *Forgot Password?*- here you will be prompted to first provide your username and click **Continue**. On the following screen (shown below) you will have the option of receiving a security code via text or email, or by answering a security question (note if security questions have not yet been set up, only the text and email options will be available). In all 3 options, you will have 10 minutes to provide the correct security code/ answer. Once they have provided the correct information, you will be able to set up a new password.
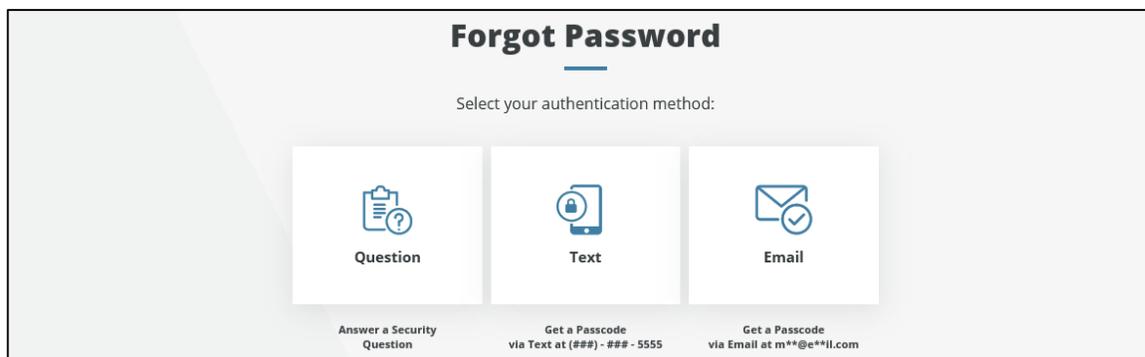
eQuipt Client Portal Navigation

Navigating the eQuipt Client Portal site is simple and easy, with information provided across tabs and sub-tabs along the top of the screen.
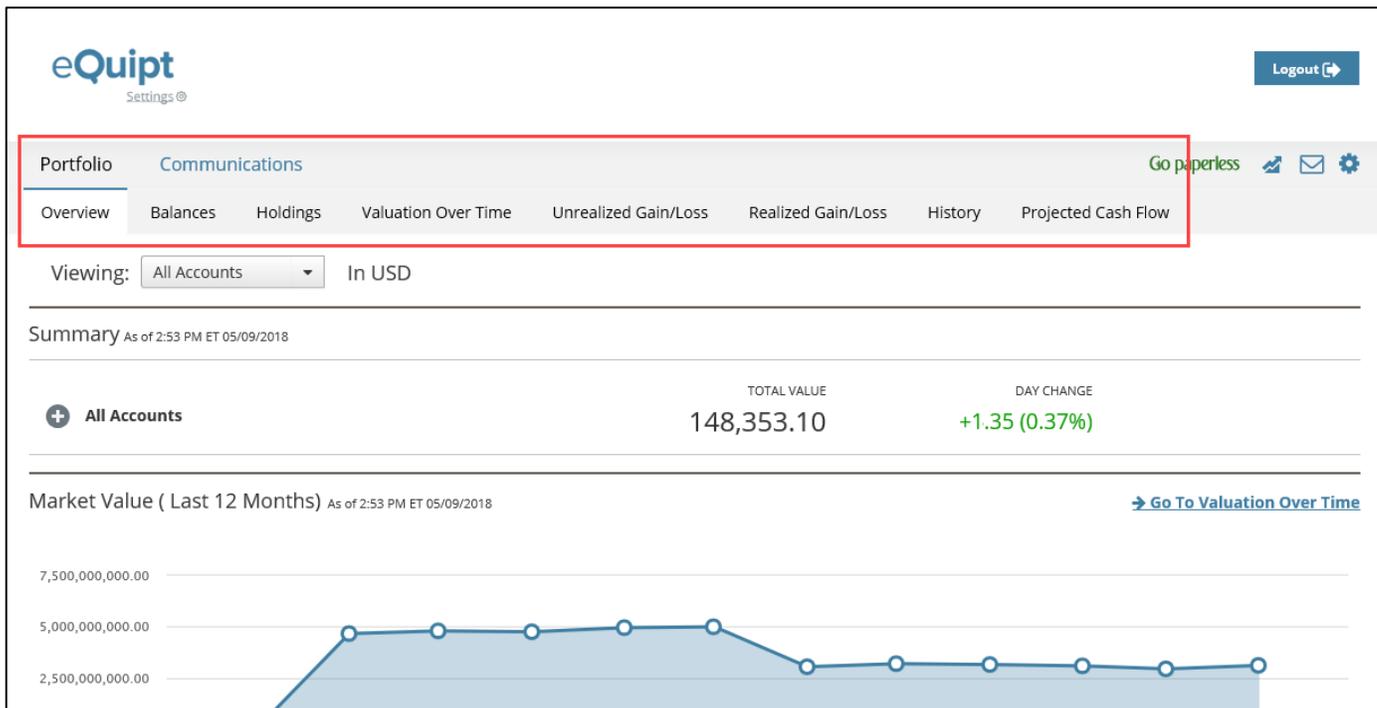
- **Portfolio**- this tab provides information about your account (or accounts) including balances, holdings, unrealized and realized gains/losses, activity history (up to 2 years of data), and projected cash flow

- **Communications**- as described in the eDelivery Preferences section, this tab enables you to enroll in paperless account communication (statements, confirms, etc.) as well as retrieve communications to which you have enrolled

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