Did you know...

Allegheny Financial Group is committed to reducing its carbon footprint on the environment while creating efficiencies for clients.

Some of our efforts include transitioning to a mostly paperless/predominantly digital environment, planting trees, and enhancing recycling efforts. With that in mind, we encourage you to utilize the digital offerings that are available:

Deposits to your National Financial Services brokerage account may be made 24/7 through the Wealthscape Investor Mobile App which is available for download via:

- App Store
- Google Play

(Daily Limit of $50,000 per user applies)

Wealthscape Investor also offers the ability to go paperless for any or all financial documents associated with your account including monthly statements and regulatory inserts, confirms and prospectuses, correspondence, tax forms, disclosures, and shareholder reports and literature.

Please consider going green and visit: myonlinebrokeragecentral.com to learn how to enroll in Wealthscape Investor, download its online app, and learn how to set up mobile check deposit. Guided tutorials are available and, as always, feel free to contact your advisor's team with any questions.

For Reports, Documents, and Paperwork, we encourage our clients to consider going paperless wherever possible. In addition to eDelivery of account statements and literature, we offer eSignature for documents and digital reports. The use of our Client Portal offers a consolidated view of your entire financial picture, storage and access of important financial documents, and allows interactive collaboration with your advisor.

We are happy to assist you in navigating these platforms.

Tax Returns and Estate Documents may be shared with your Advisor securely and electronically instead of copying and postal mailing. Be sure to ask your accountant or attorney to do this for you – it is quite common! Or contact your Advisor's team to coordinate this detail on your behalf.

Thank you for considering these options, and please let us know if you need assistance!

Go Green...
Go Digital!

Allegheny Financial Group