Wealthscape Investor[SM]

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WEALTHSCAPE INVESTOR
Initial Set-Up

Thank you for your interest in online access to your accounts held at National Financial Services (NFS). Your brokerage account and market data information are available to you on Wealthscape Investor. This will enable you to view your accounts at your leisure via the internet.

Website: https://investor.wealthscape.com

We have already registered you for access, so you can simply sign in using the Username and Temporary Password that we have provided to you.

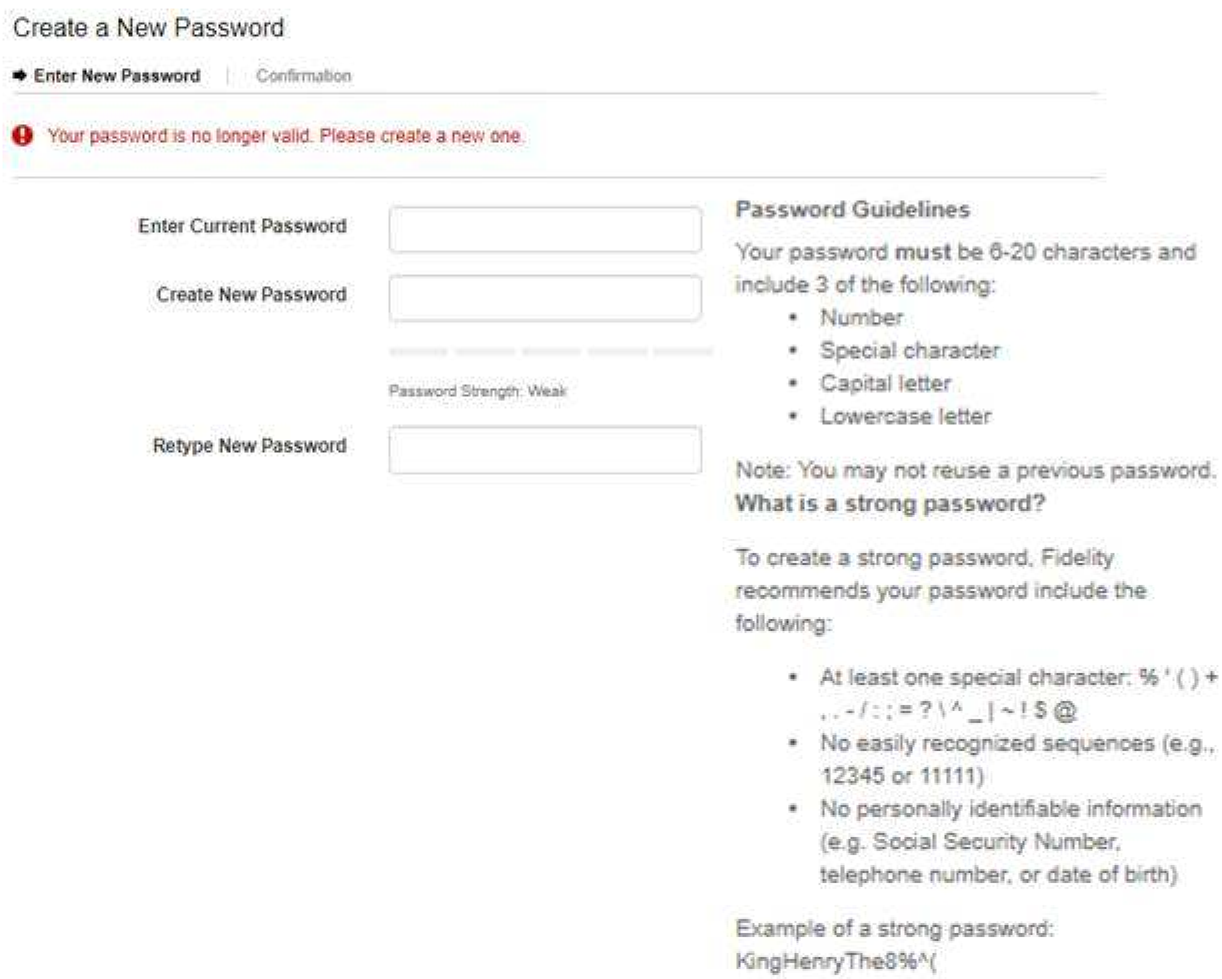
Note to Safari and Edge users: prior to your first login, you will need ensure that your internet browser is set to allow cookies. After one login, the setting can be turned back to your original preference. If you have questions on how to check or set your cookie preferences, please let us know.

For added security, we are encouraging clients to not click the “remember me” box on the login page.

Upon logging in the first time, you will be prompted to reset your password and establish a security question to assist with any future password resets.

WEALTHSCAPE INVESTOR
Reset Password

Upon logging in the first time, you will be prompted to reset your password. Please pay close attention to the password guidelines.


Create a New Password

➡ **Enter New Password** | Confirmation

Your password is no longer valid. Please create a new one.

Enter Current Password

Create New Password

Password Strength: Weak

Retype New Password

Password Guidelines

Your password **must** be 6-20 characters and include 3 of the following:

- Number
- Special character
- Capital letter
- Lowercase letter

Note: You may not reuse a previous password.

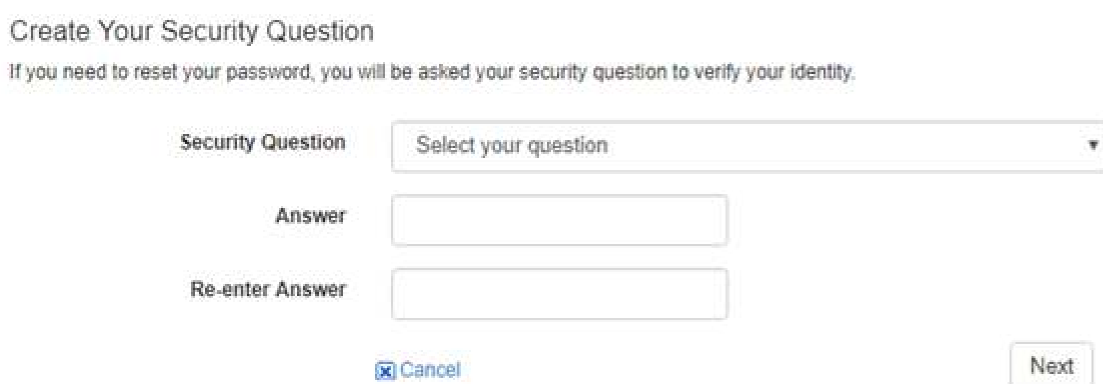
What is a strong password?

To create a strong password, Fidelity recommends your password include the following:

- At least one special character: % ' ( ) + , . - / : ; = ? \ ^ _ | ~ ! $ @
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g. Social Security Number, telephone number, or date of birth)

Example of a strong password:
KingHenryThe8%^(

You will also be prompted to establish a security question to assist with any future password resets.


Create Your Security Question

If you need to reset your password, you will be asked your security question to verify your identity.

Security Question: Select your question

Answer

Re-enter Answer

Cancel

Next

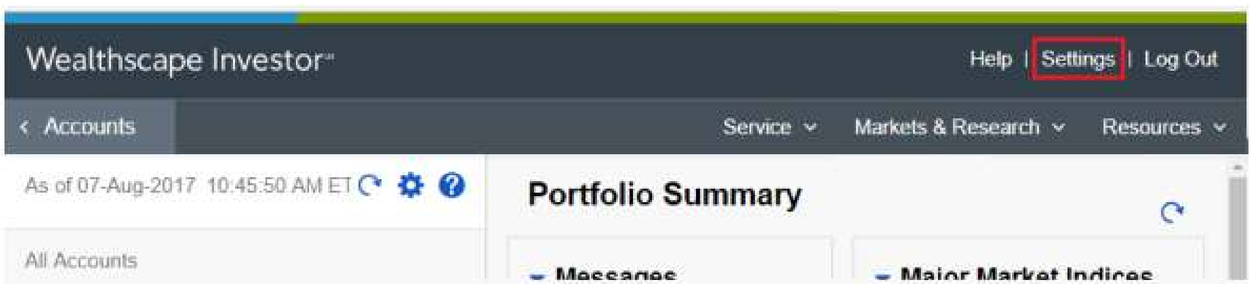
WEALTHSCAPE INVESTOR

Change Username

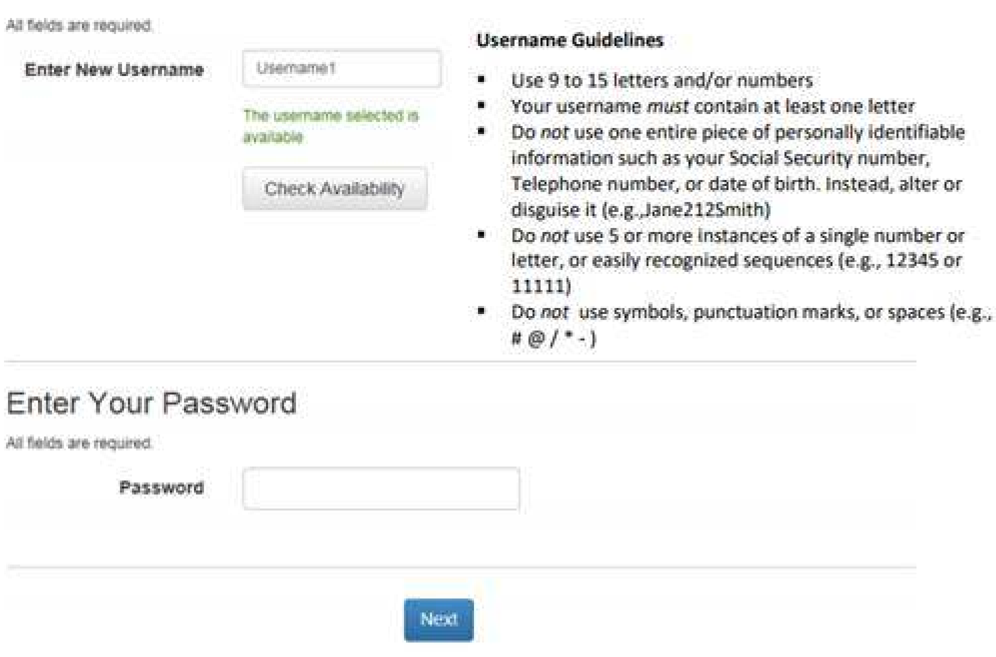
If you wish to change your Username, please follow the instructions below, making note of the Username guidelines.

Login to https://investor.wealthscape.com

- Select Settings > Change Username



- In the *Enter New Username* field, enter the new username.
- Select Check Availability to ensure that the username has not already been taken.
  - If the username is not available, a message displays.
  - If the username is available, a confirmation message displays.
- Enter your Wealthscape Investor login password in the Password box.
- Select Next.



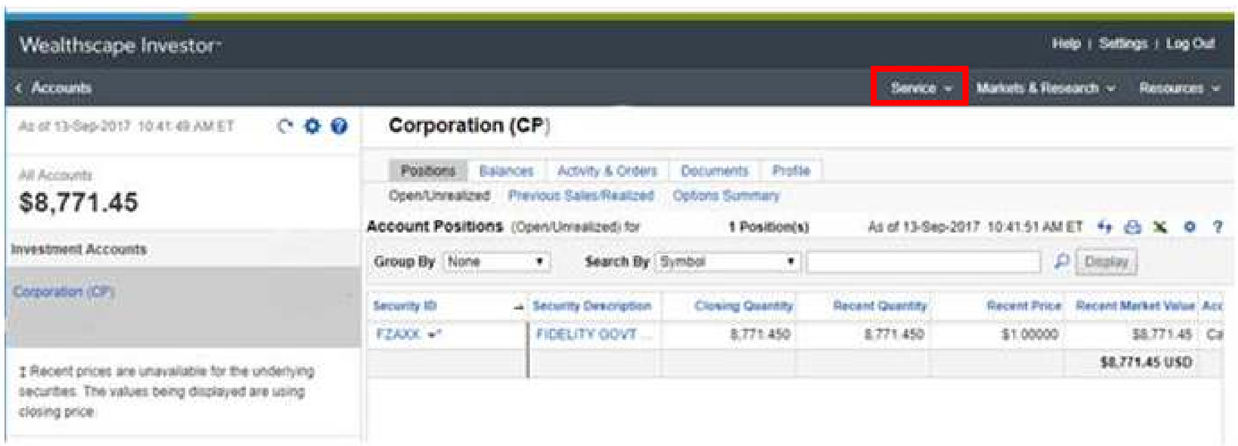
- Select Continue to Home Page (not shown) to return to the Wealthscape Investor home screen.

WEALTHSCAPE INVESTOR
eDelivery

Follow the below instructions to update the eDelivery options of select documents. You will need to follow these instructions for each account that you want to make changes to.

Login to https://investor.wealthscape.com

- Select Service >



- Select “Document Delivery Instructions.”
- Select the account you want to update.
- Add, Edit, or Confirm your email address.
- Click the Electronic Delivery radio button for any or all of the documents to enroll.
- Click the “Save this account” button to make the changes.

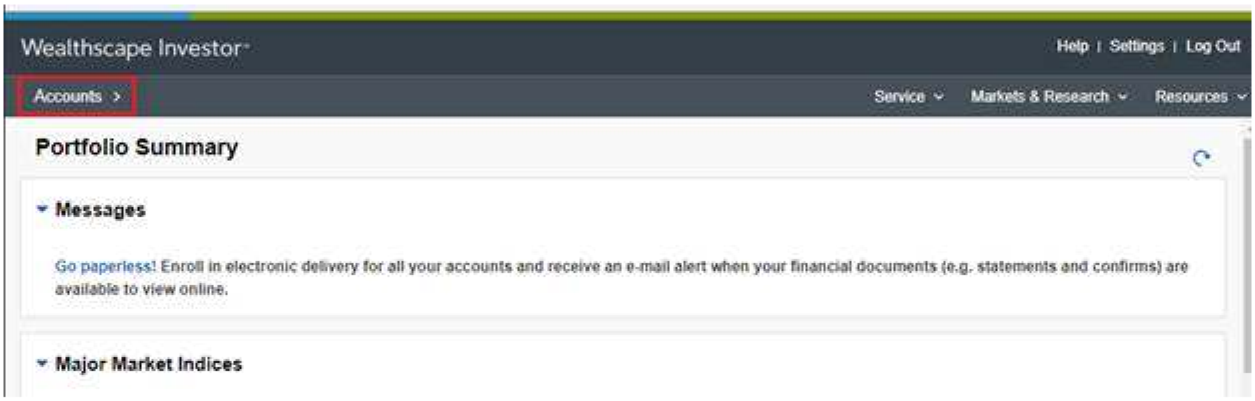
Once eDelivery is elected, online delivery will begin within 24 hours. You may also receive paper documents already printed, depending on the timing of your enrollment. Any changes made to your eDelivery preferences may take a full statement cycle to be implemented.

You will receive an email alert instructing you to login to your account every time a document is ready to be viewed.

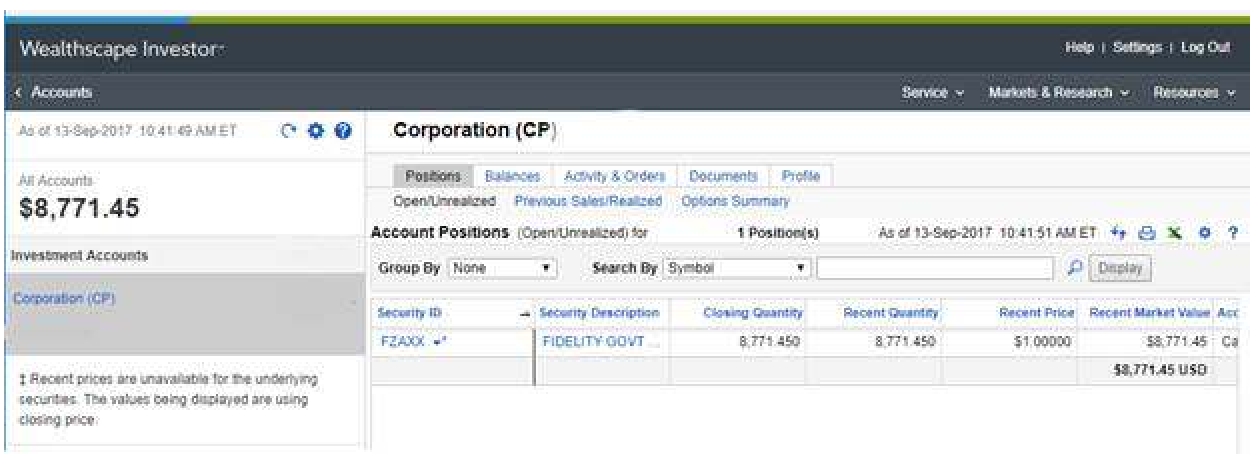
WEALTHSCAPE INVESTOR
View Accounts

Once you login, you will have access to a broad range of information you can use to track your portfolio and gain insight into market events.

- From the home page, select Accounts > and your accounts will populate on the left side of the screen.



- Highlight and click the account name to see a more detailed view of each account.



- There are several tabs at the top of the page, which provide information on that account's current holdings, balances, as well as historical documents.
- Click the "Documents tab" to view your monthly statements, tax forms, trade confirmations, and recent customer correspondence.

WEALTHSCAPE INVESTOR

Mobile Apps

Your accounts can be accessed on your mobile device by downloading the Wealthscape Investor℠ app.

iPhone and iPad
Visit the App Store to download the free app for your iPhone and iPad.
https://itunes.apple.com

Android
Visit Google Play to download the free app for your Android phone.
https://play.google.com