

Wealthscape InvestorSM

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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.



The screenshot shows the Wealthscape Investor login interface. At the top, the logo "Wealthscape Investor" is displayed in green. Below the logo, the heading "Sign In" is centered. Underneath, there is a "Username" label followed by a text input field. Below the username field is a "Remember me" checkbox, which is currently unchecked. Underneath the checkbox is a "Password" label followed by another text input field. At the bottom of the form is a blue "Sign In" button. Below the button, there are two links: "Forgot Password?" and "Register", separated by a vertical line.

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 Your password is no longer valid.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

Answer

Re-enter Answer

Cancel

Next

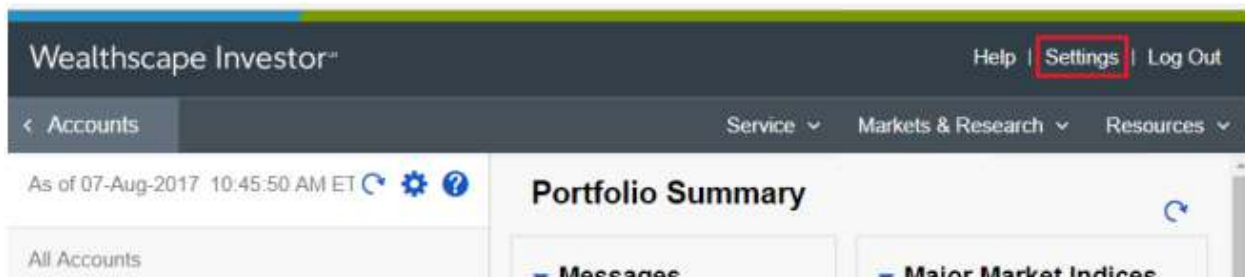
WEALTHSCAPE INVESTOR

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.

All fields are required.

Enter New Username

Username1

The username selected is available

Check Availability

Username Guidelines

- Use 9 to 15 letters and/or numbers
- Your username *must* contain at least one letter
- Do *not* use one entire piece of personally identifiable information such as your Social Security number, Telephone number, or date of birth. Instead, alter or disguise it (e.g., Jane212Smith)
- Do *not* use 5 or more instances of a single number or letter, or easily recognized sequences (e.g., 12345 or 11111)
- Do *not* use symbols, punctuation marks, or spaces (e.g., # @ / * -)

Enter Your Password

All fields are required.

Password

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 >



The screenshot shows the Wealthscape Investor interface. At the top right, the 'Service' menu is highlighted with a red box. Below the navigation bar, the account name 'Corporation (CP)' is displayed. The main content area shows account positions for 'FZAXX -*' (FIDELITY GOVT) with a closing quantity of 8,771.450 and a recent market value of \$8,771.45 USD. The 'Service' menu is located in the top right corner of the navigation bar.

- 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.

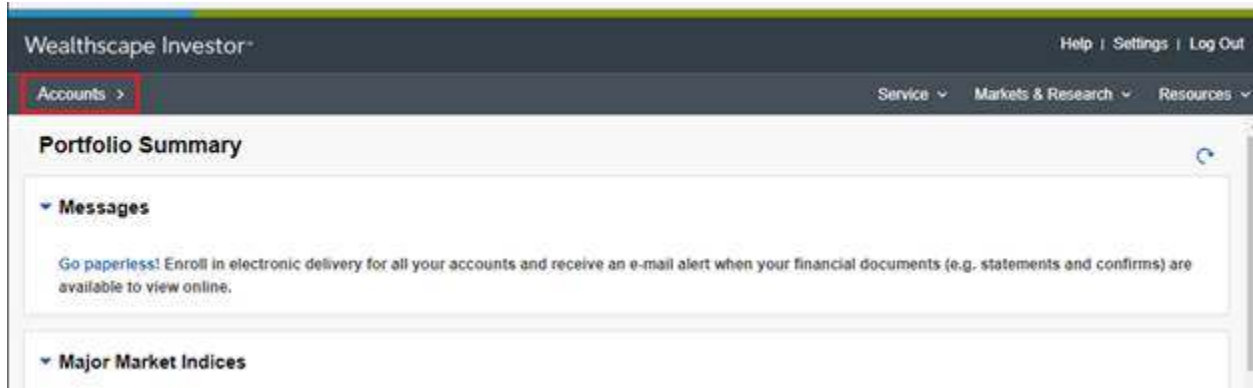
You will receive an email alert instructing you to login to your account every time a document is ready to be viewed.

WEALTHSCAPE INVESTOR

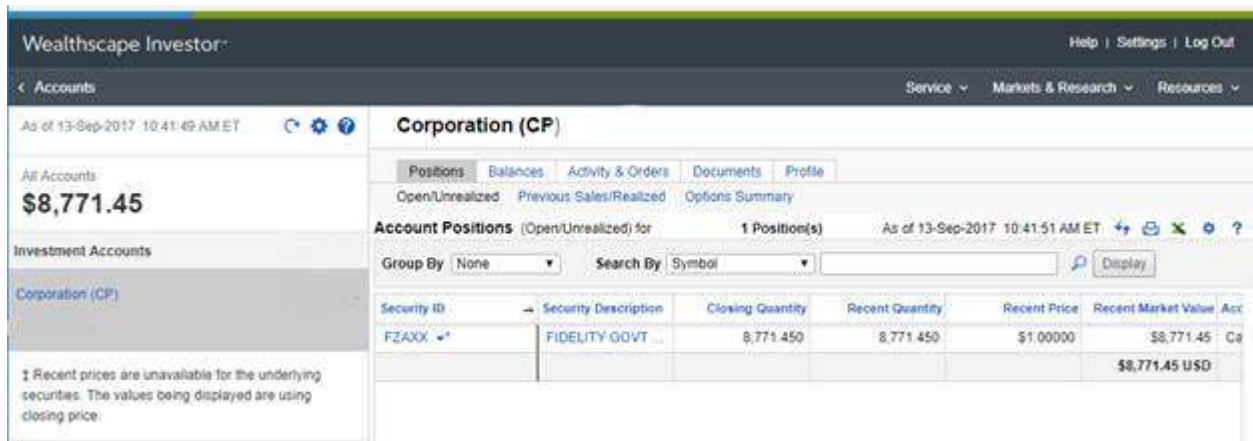
View Accounts

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 InvestorSM 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>