Logging into Wealthscape Investor℠

You can manage Fidelity brokerage account(s) with Wealthscape Investor℠. They can access positions and balances, view activity, manage important documents, access market data and research, trade, deposit checks, and move money.

Register a New User ID

If you have an active National Financial Services LLC brokerage account number, follow these steps to register and create a user ID and password in Wealthscape Investor.

A first-time registration may be easier to do on the desktop website.

1. Go to the Wealthscape Investor url and sign in: https://www.wealthscapeinvestor.com/andpartners
2. Select **Register**.
3. On the "Verify your identity" window, enter:
   a. First and Last Name
   b. Date of Birth
   c. Last four digits of Social Security number (SSN)
4. Select **Submit**.
5. A verification code will be sent to your mobile number. Enter this number.
6. Create a username and password.
7. Login, review the **User Agreement** and if you agree, click **I have read and accept the terms**.
8. Click **Next**.
9. Download the Wealthscape Investor mobile app and login with your new username and password.

Change a password

Follow these steps to change your password. If the current password is entered incorrectly three times, the password is deactivated and must be reset.

1. Select **User Options** > **Change Password**.
2. In the "Enter Current Password" field, enter the password used to sign in to Wealthscape Investor.
3. In the "Create New Password" field, enter a new password by following the "Password Guidelines".
4. In the "Retype New Password" field, enter the new password again and select **Next**.
5. A message displays confirming the password changed. Shortly, you'll receive an email to ensure you're aware that your password was changed.

Create or change a username

Sign into the &Partners Wealthscape Investor sign-in page or the new Wealthscape Investor app.

1. In Wealthscape Investor, select **User Options** > **Change Username**.
2. In the "Enter New Username" field, enter a new username by following the "Username Guidelines".
3. Select **Check Availability**. If the username is not available, repeat steps 2 and 3. If the username is available, a confirmation message displays.
4. Enter your password.

5. Select **Next**.
6. Select **Continue to Home Page**. You’ll receive one of these emails:
    - A "Creation of a New Custom Username" email to ensure you’re aware a new custom username was created.
    - A "Modification to Your Login ID" email to ensure you’re aware the username was changed.

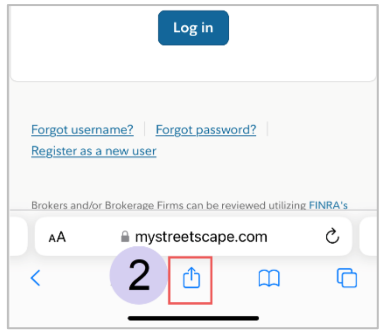
Online Access | Frequently Asked Questions

Q: How do I access Wealthscape Investor from my phone or tablet?

1. If you are already registered, pull up a web browser and type https://www.wealthscapeinvestor.com/andpartners. Enter in your username and password.

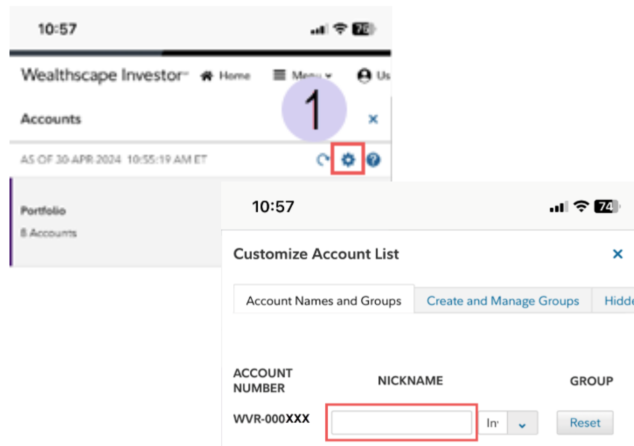
Note: Select remember my username.

2. If you are using an iPhone/iPad, look at the bottom of your screen for a square button with an arrow near the middle.
3. You will scroll to the option **Add to Home Screen** > **Add**.
4. You should see the icon appear on your home screen with a grey background and white W.



Q: How do I apply nicknames to my accounts to differentiate between them?

1. Navigate to the home screen (accounts will be listed on the left) and select the gear on the right.
2. Select customize account list, enter your nicknames, then click **Save & Apply**.



Q: Can I see my spouse or partner's accounts on my login? Yes, if you wish to grant access to your partner or spouse to view your accounts through their own login, please reach out to our office and they will generate the paperwork for you.

Q: Can I move money between my investment account and bank accounts on my own? Our team is happy to facilitate any money movement for you. However, if you wish to process this on your own, you will be able to in the browser version.

1. Click **Menu** > **Money Movement** > **Transfer/Withdraw Money**
2. Select the account. If you have set up a bank account with our office, you should see "A Bank Account" as a drop-down option.
3. Select the "To" account.

   Note: If you have not set up a bank account, please contact our office.

Q: How do I manage my document delivery settings?

1. Access **Menu** > **Forms & Instructions** > **Document Delivery Instructions.**
2. Select which documents you prefer to be delivered by email or mail.