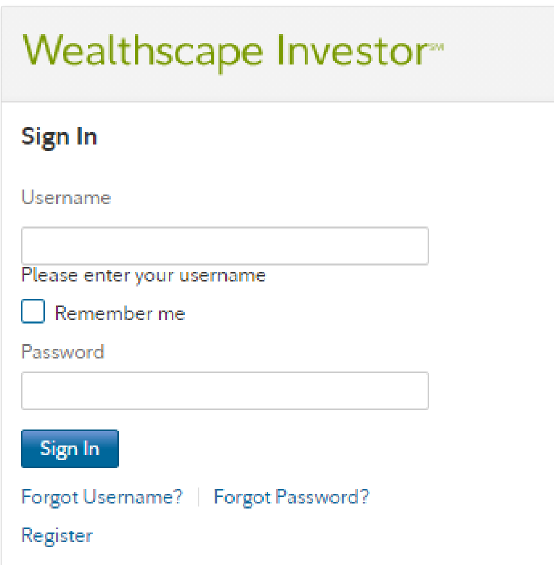
Wealthscape Investor℠

Manage your brokerage account experience

By registering for an Online Brokerage Account, you get 24/7 access to your account information. In addition, you can stay connected to your brokerage account on your smartphone or tablet with the convenient mobile app, giving you access virtually any time you need it.

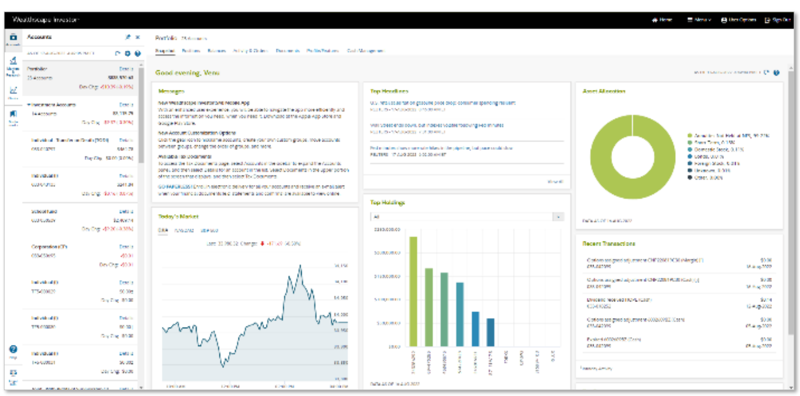


Easy Steps to Access Your Brokerage Account Online

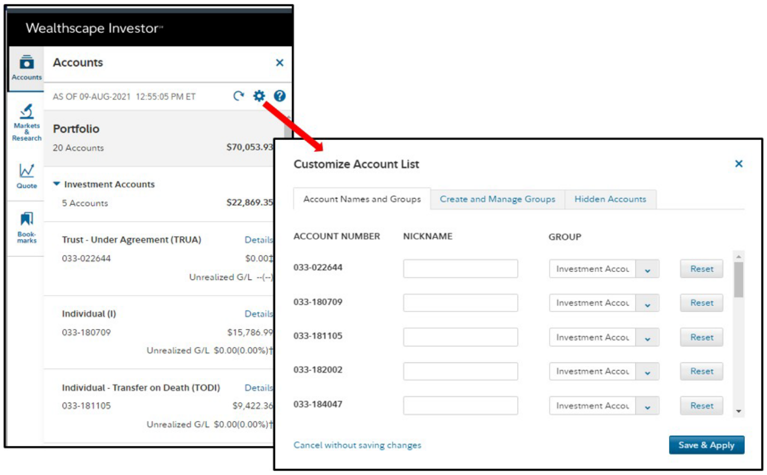
- Visit the Wealthscape Investor℠ login page
- Click the Register link
- Enter the last four digits of your Social Security number, and enter your first name, last name, and date of birth
- Enter your brokerage account number, which can be found on a recent brokerage account statement or confirmation
- Once your identity has been verified, your user ID will be displayed on your confirmation page
- You'll be prompted to establish and confirm your username and create your security questions

Simple Accounts Panel

- Up to 200 accounts list on the panel.
- Accounts are organized in expandable segments, such as Investment Accounts.
- Segments display only if accounts of that type are associated with the account holder.



Screenshots are provided for illustrative purposes only.

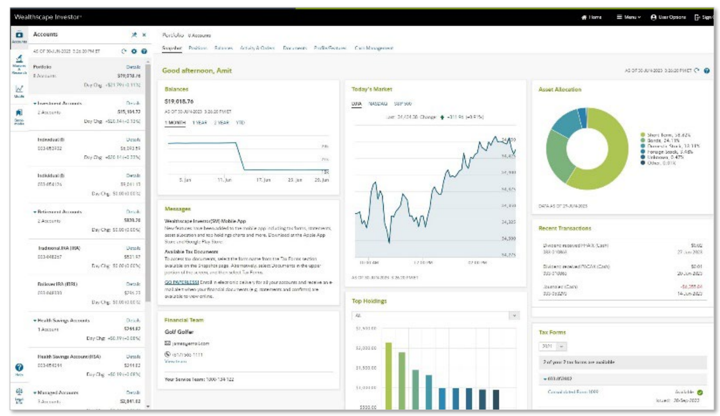


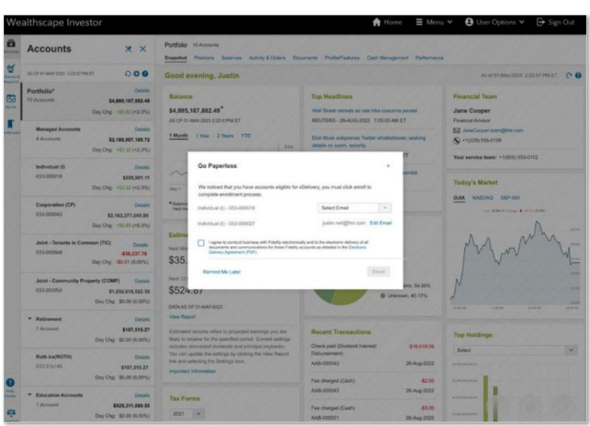
Customize Your Account Panel

- Create custom groups to organize related accounts
- Assign accounts to either a custom group or a system-defined group
- Rearrange the order in which the groupings of accounts are displayed
- Hide zero balance accounts from displaying on the Accounts Panel
- Set meaningful nicknames for accounts to make them easier to identify

Quick Portfolio Snapshot Shows How You're Doing

- **Balances:** Displays the balance information over a look-back period from one month to up to two years.
- **Financial Team:** Displays the contact information of the financial representative(s) on the account.
- **Top Holdings** allows you to view and filter your top 10 securities.
- **Asset Allocation** provides a visual breakdown of asset classes.
- **Recent Transactions** displays the five most recent transactions from all accounts within the past 90 days.
- **Tax Forms** provides links to view the available and corrected tax forms and estimated dates for forms that are in progress.
- **Menu Tabs** on the homepage allow for quick access to pages.
- **Details Link** at portfolio and group level allows you to switch the context when viewing the page.





Go Paperless Interstitial

- An interstitial prompt appears on the home page to guide investors to sign up for eDelivery of documents
- Investors can add, edit, and enroll in the intuitive and simple experience
- Clicking 'Remind Me Later' hides the prompt for a week
- After 5 attempts, the prompt will stop displaying

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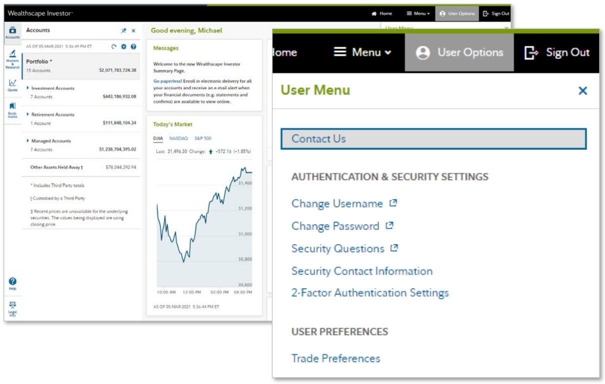
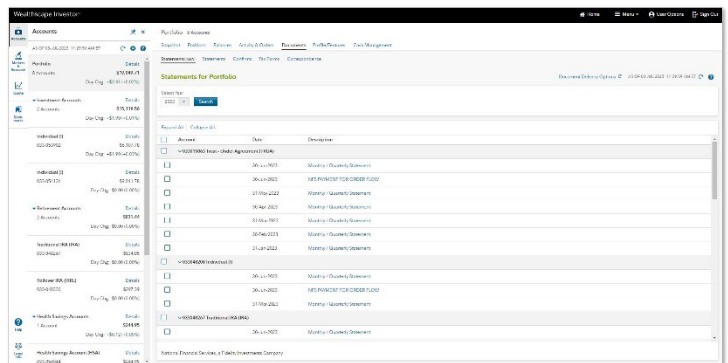


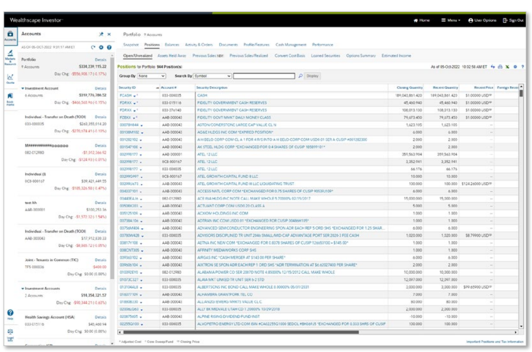
Customizable User Options

- Access user settings from User Options located next to the Menu.
- Change username, reset passwords, 2-factor authentication settings and more.

Easy Access to Documents

- Statements, Confirms, Tax Documents and Correspondence
- Select the Documents link in the upper portion of the screen that displays.
- Select Accounts in the top left of the navigation bar to expand the Accounts panel, and then select the account or account group in the list.
- Filter documents by the year for easy viewing
- Download up to 12 documents at a time from Statements and Tax Documents



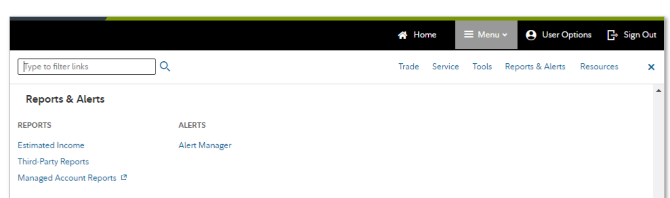


Personalize Your Account Positions

- Customize the layout of your Account Positions screen to sort and filter the data you want to focus on.
- View the total value for all accounts in the portfolio and separate totals by segment.

Reports & Alerts

- Find reports, including estimates of future monthly cash flows for the next 12 months (Estimated Income).
- Sign up for event notifications through Alert Manager.
  For example, receive an email alert when an EFT (Electronic Funds Transfer) is processed.



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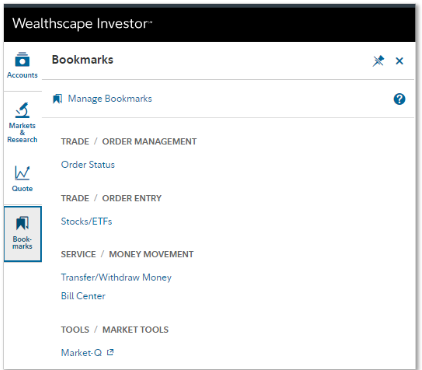
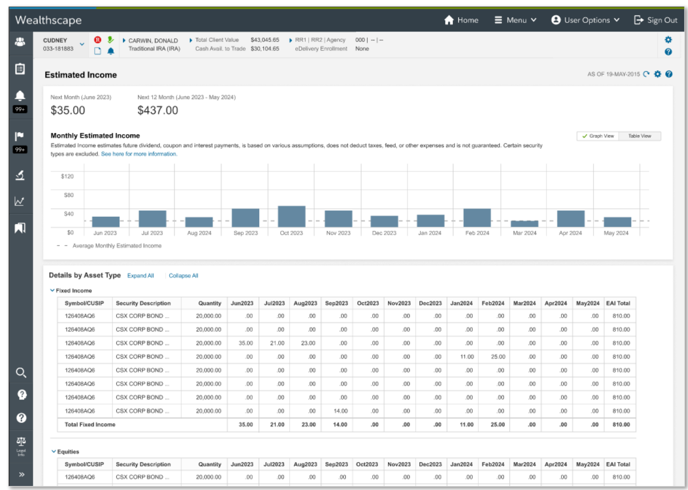


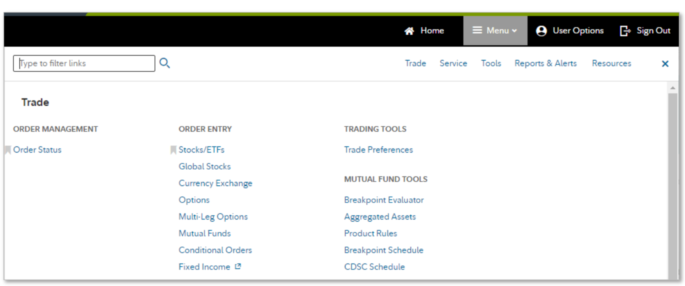
Bookmarks

- Save a collection of favorite windows for quick access.
- Select Manage Bookmarks, then choose the check box of each window to bookmark.

Estimated Income

- **Plan with Confidence:** Easily view projected earnings over a specified time period to better understand expected income and make informed investment decisions—ideal for retirement planning and budgeting.
- **Interactive Income Insights:** Explore dynamic charts showing monthly estimated income and detailed projections across all positions for the next 12 months.
- **Flexible Breakdown Views:** Analyze income projections by Asset Type and Security, with features like default sorting and average income display for streamlined insights.
- **Export & Share:** Seamlessly export income data to CSV or PDF formats for sharing or offline planning.





Menu Shortcuts

- A single menu for consolidated access to options for Trade, Service, Tools, Reports & Alerts, and Resources.
- To quickly locate a specific option, in the filter box, type the name of the option to return matching results.

  For example, type "tra" and only those options containing "tra" display, such as Trade Preferences and Transfer/Withdraw Money.

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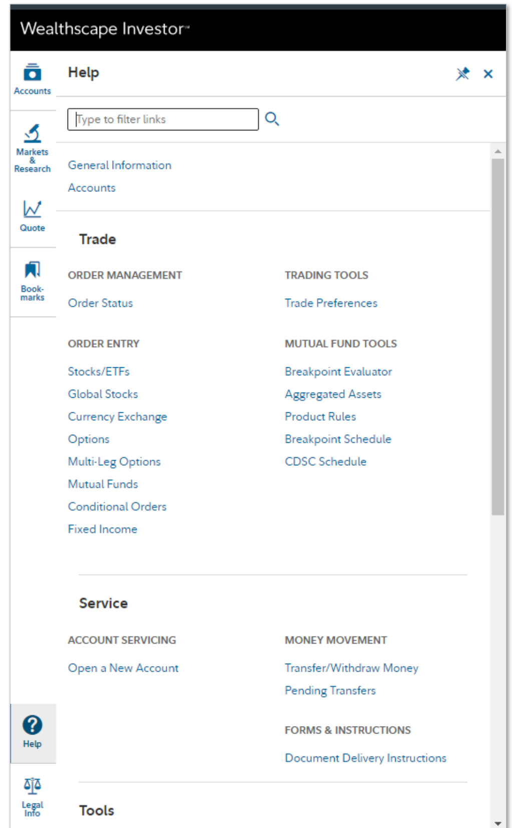
Need More Help?

- Learn more about using Wealthscape Investor.
- Select Help to open an index of available topics.
- Click a link to view step-by-step procedures and field definitions.



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To register for an Online Brokerage Account, please contact your financial representative.

Use of the Wealthscape Investor℠ brokerage mobile app requires an active Online Brokerage Account.

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