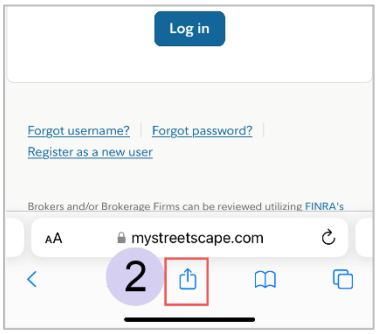
Online Access | Frequently Asked Questions

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 your username and password.

Note: Select **Remember my username**.

2. If you are using an iPhone/iPad, at the bottom of your screen, find a square button with an arrow near the middle.
3. 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.
5. The mobile app can also be downloaded on the App or Play store by searching "Wealthscape Investor"

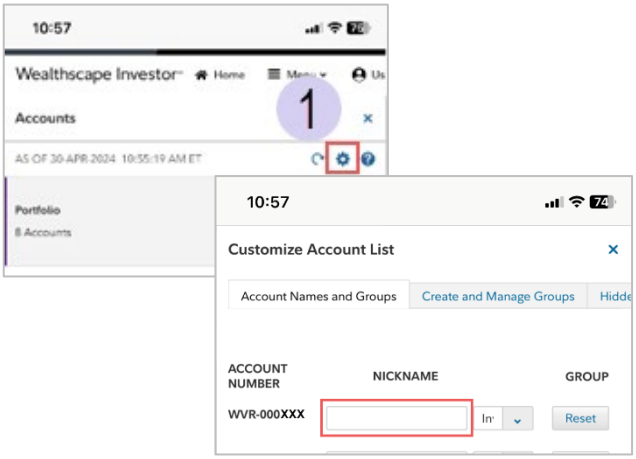


Q: How do I apply nicknames to my accounts to differentiate between them?

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 > **Save & Apply**.

Q: How can I group my accounts together?

1. On this same settings page navigate to the **Create and Manage Groups** tab > **Create Custom Group**.
2. Groups can be assigned to your accounts by selecting the box to the right of the nickname.



Q: Can I see my spouse, family member, or partner's accounts on my login? Yes. If you have Wealthscape Investor access, you can contact your financial advisor, and they will file a request to grant you access. Access to accounts will be granted within a few business days.

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 on your own, you can on eligible accounts. Your account needs to start with WVR - Money movement is not available on most WVM (Managed) accounts. If you have WVR account(s) and would like to move money, please reach out to your advisor so they can establish instructions to grant you this permission.

1. Click **Menu** (top right corner of the screen) > **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 appropriate option from the "To" field.
   Note: If you have not set up a bank account, please contact your financial advisor.

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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.

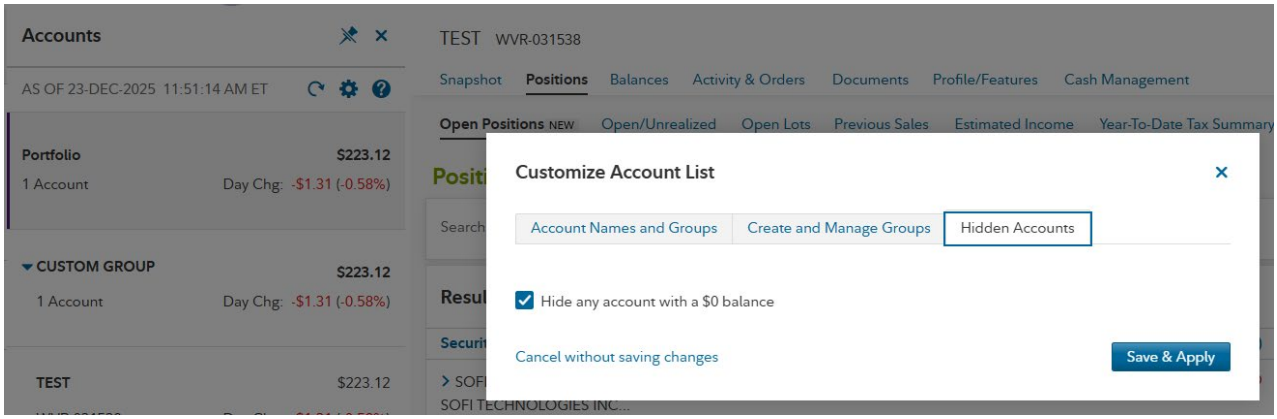
Q: I have an annuity. Where can I view it? Annuities can be viewed on the browser version of Wealthscape Investor when you select an account under the **Positions** tab > **Assets Held Away**.



Q: What is the delay on Wealthscape Investor when viewing my account's actual value? Wealthscape Investor uses real time values (with up to a 15-minute delay) for everything except funds.

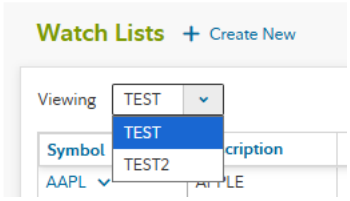
Q: How do I remove a closed account from my Wealthscape Investor portal?

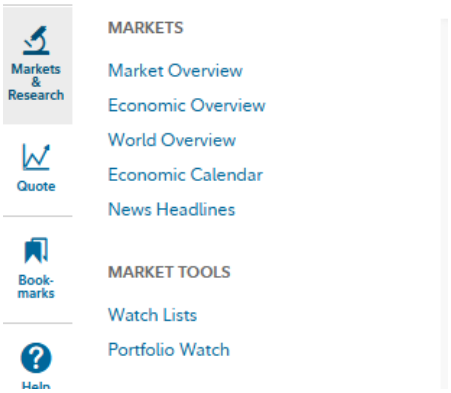
1. Click on the settings wheel above your portfolio total on the accounts list.
2. Navigate to the **Hidden Accounts Tab**.
3. Check the **Hide any account with a $0 balance** box, then **Save & Apply**.



Q: How can I create Watch List(s) for certain stocks?

1. Click **Markets & Research** on the left-hand side of the screen.
2. Select **Watch Lists** from this menu
3. Click **Create New** at the top of the screen and add chosen symbols.
4. You can switch between multiple watch lists with different information.





Q: How do I correct my phone number on Wealthscape Investor to receive the two-step verification text/call?

1. Reach out to your financial advisor for the code to get through the two-step verification
2. Once in the account you can update the number.

Q: How can I place a block on my online access? Reach out to financial advisor to request a block and they will restrict/un-restrict at your request.

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