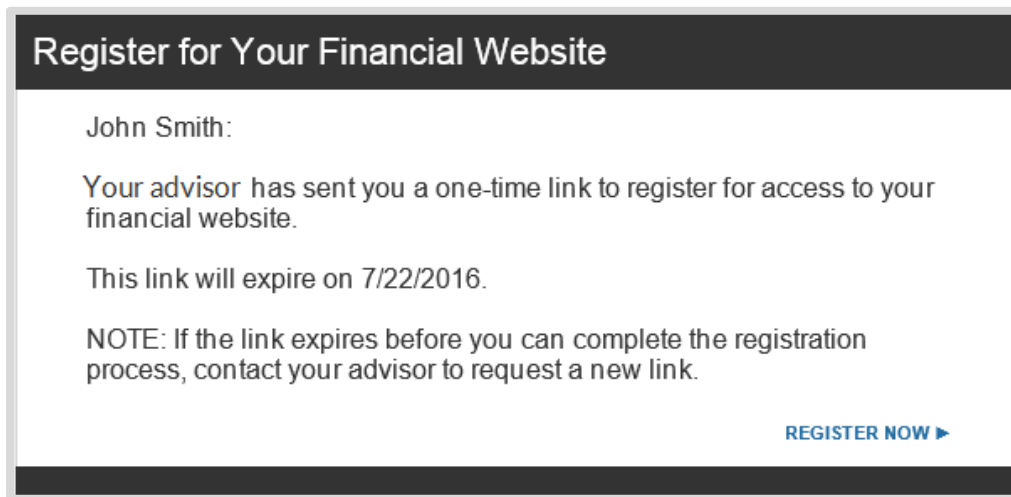


Website Registration Process

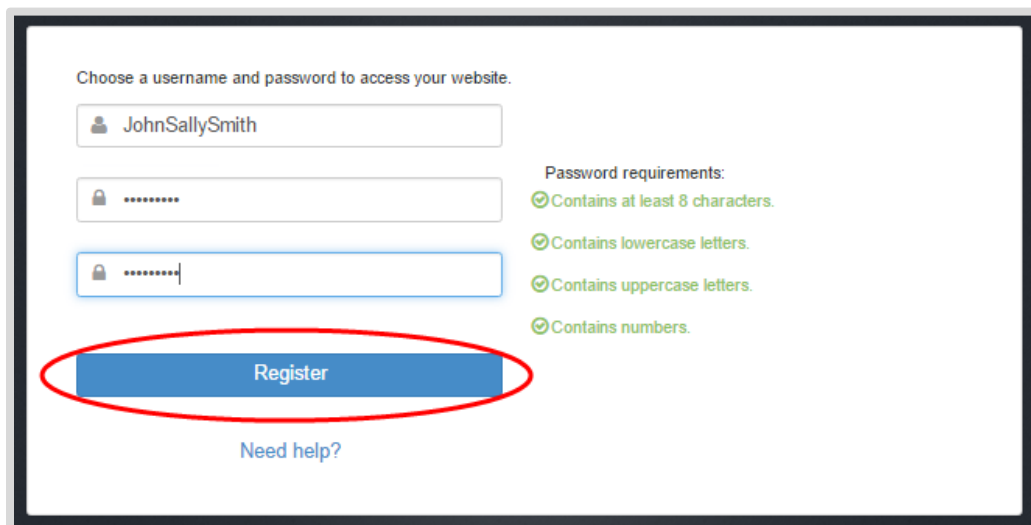
In this userguide, we will demonstrate how to register your website in a few simple steps! Your financial representative will send a system generated email with an embedded registration link. For your security, this link has redemption codes built into it. This means that the link you received is one time only use. Once the link has been clicked on, it will then expire. Make sure not to click the link until you are fully ready to complete the registration process! Registration should take no more than 10 minutes.

Please Note: The registration invitation email expires 7 days from initial receipt. If you delete the email, your financial representative will be able to resend it.

1. From your email, open the invitation email.



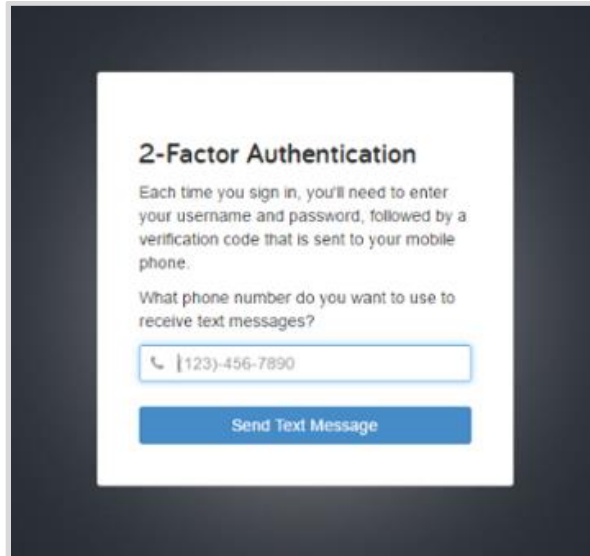
2. The link will open a new page in your default internet browser. Here you will establish a unique Username & Password. Follow the password meter to confirm you have met the security requirements.



Website Registration Process

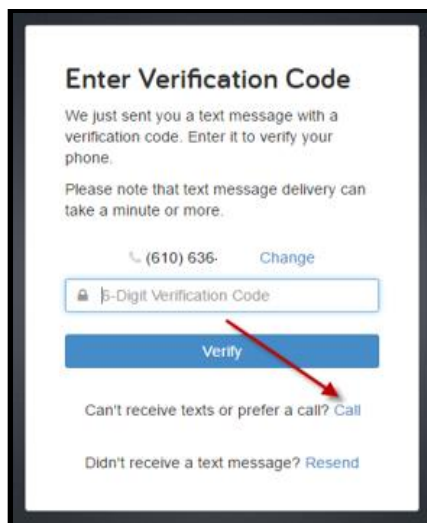
3. After establishing your Username and Password, you are required to register for 2-Factor Authentication (2-FA.) The main purpose of 2-FA is to ensure the security of your information. 2-FA will verify your identity using a PIN sent to your phone. This is an important measure in safeguarding your personal financial data, a matter we take very seriously.

You will first register your Primary phone to be used for 2-FA. Enter your phone number and click **Send Text Message**. If you enter a landline, you can choose to receive a phone call that reads your PIN to you. For international phones, add a “+” in front of your number.



The screenshot shows a white form titled "2-Factor Authentication" centered on a dark background. The text reads: "Each time you sign in, you'll need to enter your username and password, followed by a verification code that is sent to your mobile phone." Below this is the question "What phone number do you want to use to receive text messages?". A text input field contains the phone number "(123)-456-7890". At the bottom of the form is a blue button labeled "Send Text Message".

4. Once you have received your PIN, enter the 6 digit code into verification box and click **Verify**. Click the Call link to have the verification code read to you over a phone call. The code expires after 10 minutes, click the Resend link to receive a new PIN verification code.



The screenshot shows a white form titled "Enter Verification Code" centered on a dark background. The text reads: "We just sent you a text message with a verification code. Enter it to verify your phone. Please note that text message delivery can take a minute or more." Below this is the phone number "(610) 636-" with a "Change" link next to it. A text input field is labeled "6-Digit Verification Code". Below the input field is a blue button labeled "Verify". A red arrow points from the "Verify" button to a link that says "Can't receive texts or prefer a call? Call". At the bottom of the form is a link that says "Didn't receive a text message? Resend".

Website Registration Process

- Next you will be prompted to set up a recovery phone. This number will be used if you do not have access to your primary phone while trying to login.

Setup 2-Factor Recovery Phone

Set up a recovery phone so that you can access the system if you cannot receive verification codes on your primary number. You can choose to skip this now and be reminded in 30 days.

What phone number do you want to use as a recovery phone? Please note this number cannot be the same as your primary 2-factor phone number.

(610) 234-

Submit

[Skip this for now](#)

- Next, you will be prompted to answer 3 security questions.

Security Questions

You will be asked one of these questions when logging in from a device for the first time or to reset your password if you forget it.

Question 1 of 3

Set a question...

Answer

Confirm Answer

Question 2 of 3

Set a question...

Answer

Confirm Answer

Question 3 of 3

Set a question...

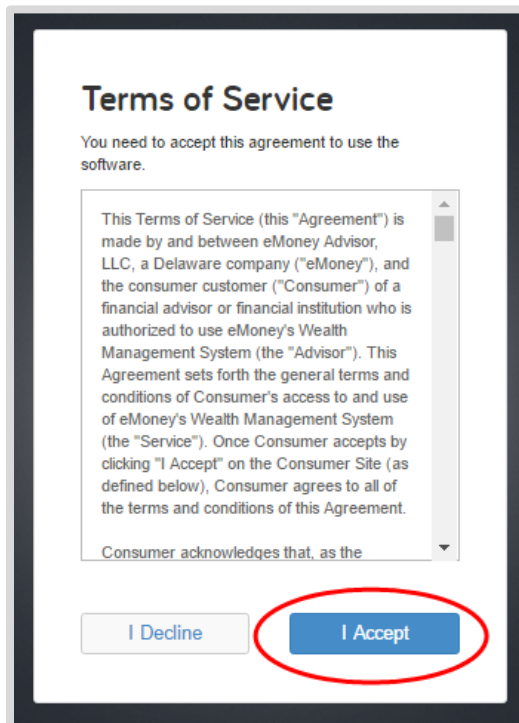
Answer

Confirm Answer

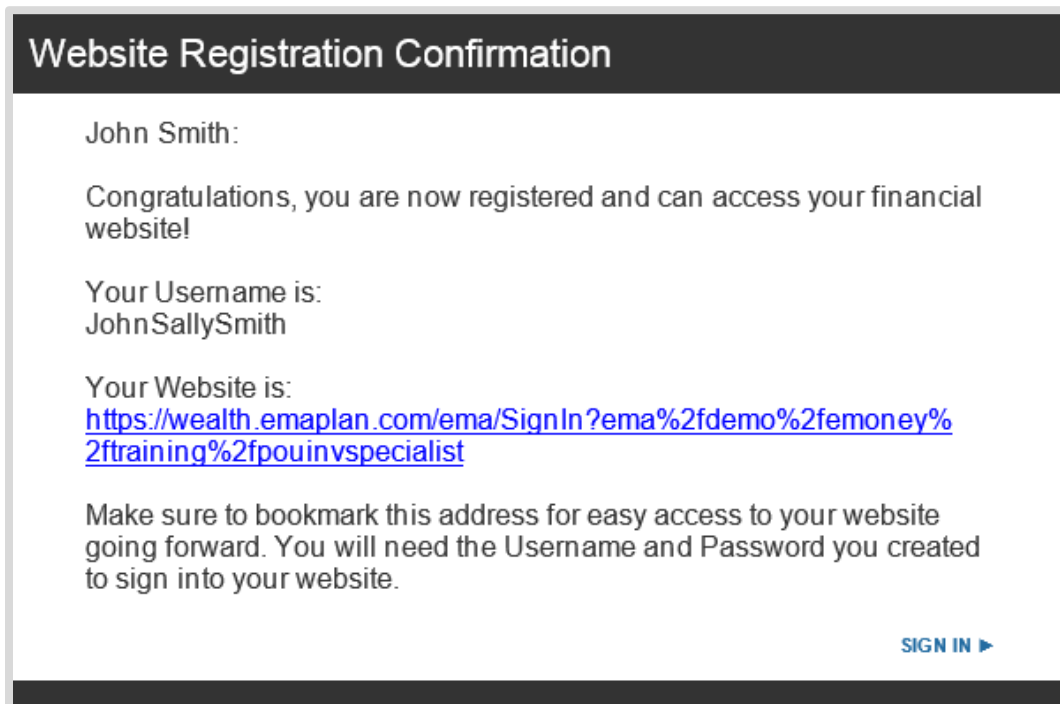
Continue

Website Registration Process

7. Finally, read and accept the Terms of Service.



8. Once you have successfully registered for your website, you will receive a confirmation email as shown below. Save the log on link to your bookmarks for easy access!



Safe & Secure

Your wealth management system employs advanced security features and protocols to keep your data safe, private, and secure at every hour of every day, year round.

Our comprehensive security measures include password protection, Secure Socket Layer encryption, firewalls, intrusion detection, audits, inspections, and more.

With each measure in place, you can be confident that your important information is safe and secure.



Password Protection

You have a unique username and password, ensuring that only you can access your information. Submitting incorrect login credentials three consecutive times will automatically lock your account for 10 minutes. This is to block any manual or programmed hacking attempts.

In most cases, we have no access to your username or password. However, if you decide to provide us with this information, we will never share your username and password over the phone or send it to an email address not pre-registered with your account.



Highest Encryption

Our system uses a 256-bit Secure Socket Layer to scramble your data, further preventing access to unauthorized users. This is the highest level of encryption currently available today, and twice the standard followed by many financial institutions, including banks.



Routine Security Testing

Your wealth management system uses third-party security auditors and software, including TraceSecurity, Tenable Security and White Hat Security, to identify vulnerabilities within your system and to assist us with remediation efforts.



2-Factor Authentication

Your wealth management system employs 2-Factor Authentication (2FA), a complete fraud detection platform that uses a dynamic risk- and rules-based approach to identify highrisk behaviors and initiate an additional layer of security. With 2FA, you are sent a verification code to your mobile phone, which you are required to input along with your username and password in order to access your personal financial website. This additional layer of protection safeguards your sensitive financial data and strengthens the security of your account by requiring two methods of verifying your identity.



Non-Transactional

Unlike on line banking, trading or shopping websites, your money cannot be moved, withdrawn or accessed on our system.