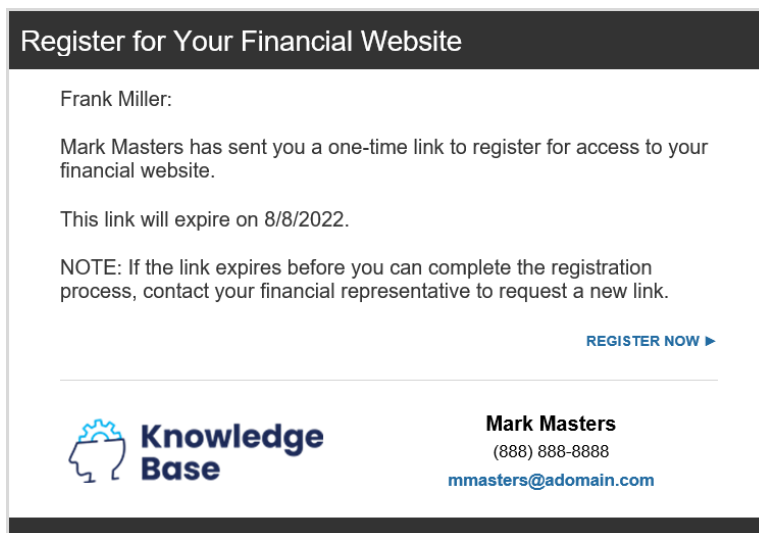


Website Registration Process

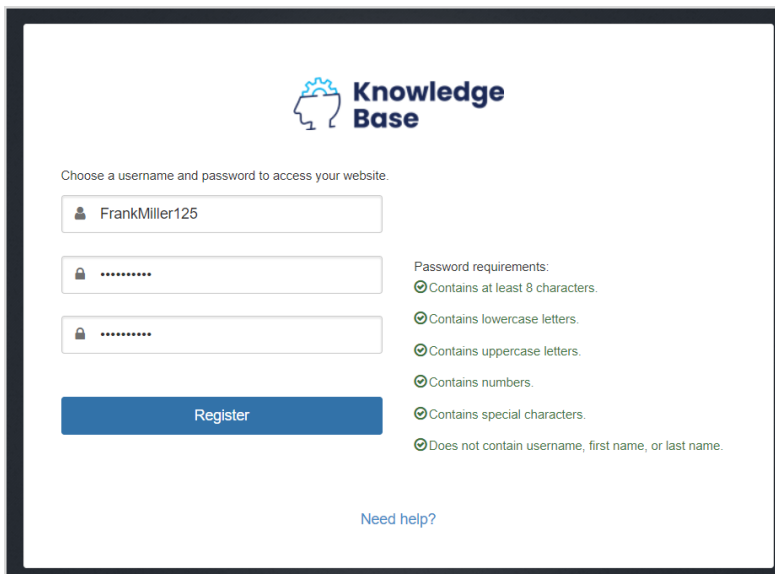
In this user guide, we will demonstrate how to register for your website in a few simple steps! Your financial representative will send a system generated email with an embedded registration link. For your security, this link has redemption codes built into it. This means that the link you received is one time only use. Once the link has been clicked, 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 inbox, open the invitation email. Then click **Register Now**.



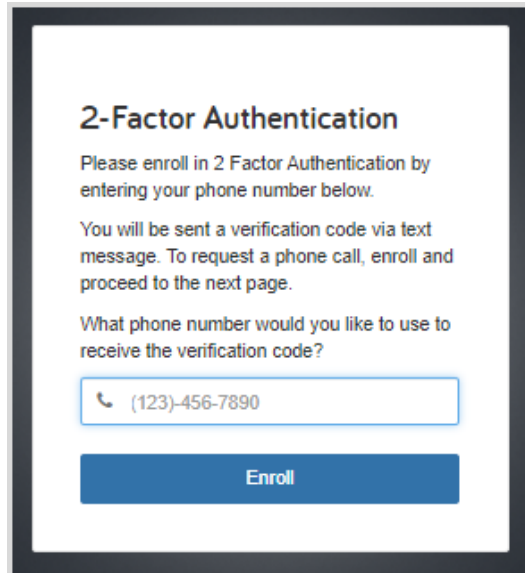
2. The link will open a new page in your default internet browser. Here you will establish a unique Username & Password. Follow the password meter to confirm you have met the security requirements. Click **Register** to continue.



Website Registration Process

- 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 **Enroll**. For international phones, add a “+” in front of your number.



2-Factor Authentication

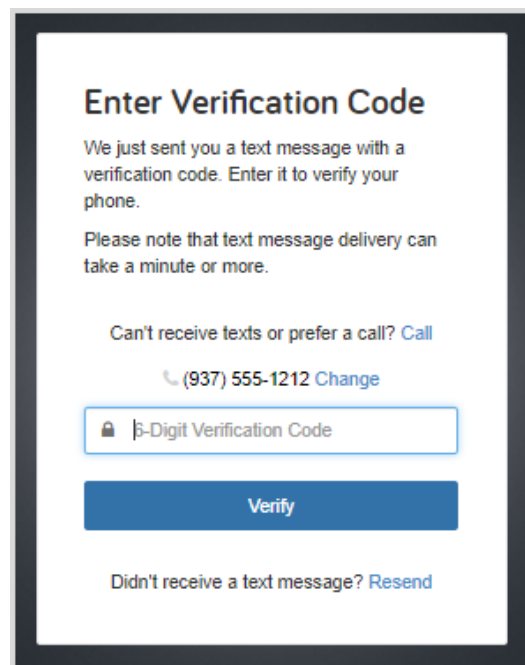
Please enroll in 2 Factor Authentication by entering your phone number below.

You will be sent a verification code via text message. To request a phone call, enroll and proceed to the next page.

What phone number would you like to use to receive the verification code?

Enroll

- 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.



Enter Verification Code

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.

Can't receive texts or prefer a call? [Call](#)

Verify

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. Enter another phone number and click **Submit**, or you can elect to **Skip this for now**.

Set Up 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.

(937) 555-1213

Submit

[Skip this for now](#)

- Next, you will be prompted to setup 3 security questions. Fill in all available fields and click **Continue**.

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... ▾

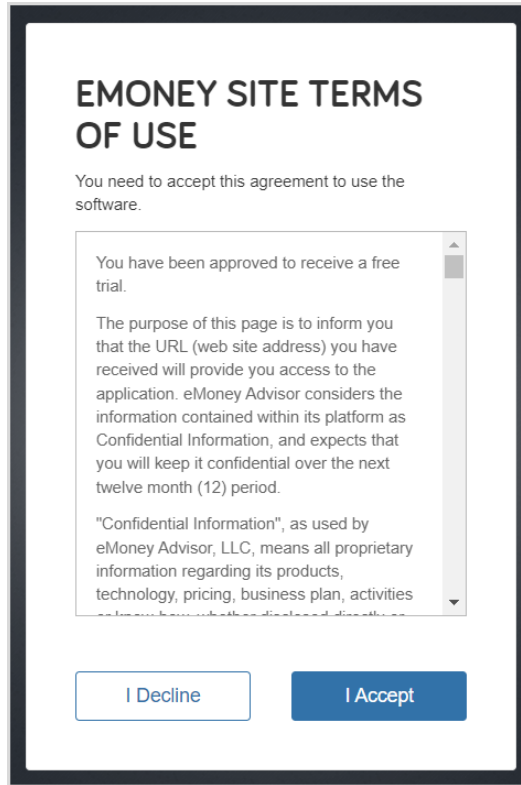
Answer

Confirm Answer

Continue

Website Registration Process

7. Finally, read the Terms of Service and click **I Accept**.



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!

