

Enroll for Access Online

If you would like to have online or mobile access to your Advantage Program, IRA, or Investment (Brokerage) account:

1. Select the "Sign Up" link from your firm's Access Online login screen.

2. You will be asked to enter your account information and answer a few personal questions to verify your identity.
3. Once verified, you will be asked to enter the account numbers you would like to view online and will then be prompted to create your Access Online User ID and Password.
4. Upon your initial login to Access Online, you will be presented with an Online Agreement which will need to be reviewed and accepted only once. You will then be asked to create three security questions and answers for future password resets.

5. You will then have immediate online and mobile access to your accounts and documents.

Account Summary

What's New

Go Paperless

Reduce clutter and securely access up to seven years of your account documents under the Statements & Documents tab in Access Online.

Account Summary

Securities priced as of Previous Market Close

[Nickname your Accounts](#) [Group Accounts](#)

Account Name ▲	Account Number	Account Type	Securities Market Value	Cash & Cash Alt.	Margin Balance	Account Value	Change from Previous (%)
Brokerage ◀	*1234	Margin	\$90,366.68	\$2,472.10	\$0.00	\$92,838.78	0.01
Household Total			\$90,366.68	\$2,472.10	\$0.00	\$92,838.78	0.01

The Account Value and Securities Market Value columns are calculated with market prices as of the stated "As of" date and time, or as of the last price available where applicable. All figures are updated to reflect intraday account activity.

Please Note: During the late evening and early morning hours, weekends, and holidays, account balances may fluctuate significantly and not reflect accurate values due to pricing updates received throughout the night.

◀ Denotes account currently selected.

Quotes are delayed at least 15 minutes during market hours, unless otherwise indicated. Note that some securities such as bonds and mutual funds are not priced in real time but are priced on a daily or periodic basis. Real time quotes and market data is provided by a third party and is believed to

For assistance with enrollment or for technical support, please contact Access Online Support at **1-877-488-3748**, 24 hours a day, 7 days a week.

Go Paperless

With Access Online, you have immediate online access to your account Statements, Trade Confirmations and Tax Documents/1099s - as soon as they are created.

Go paperless by turning off paper delivery of your account documents and shareholder communications:

- Log in to Access Online and select 'My Profile' under the Customer Service tab.
- From the 'Delivery Preferences' page, choose to turn off paper delivery for all account documents or only for specified documents in certain accounts.
- Create a 4 digit Shareholder Communications PIN so you can vote your proxy shares online.
- Select an email address to which an email notification can be sent when a document is available to view online.
- Review the **Disclosure Statement Regarding Electronic Delivery of Documents**. By accepting the disclosure statement, you will turn off paper delivery of your selected documents sent through the mail.
- To view your documents online, select Statements & Documents under the Accounts & Services tab.

NOTE: If any of your shareholder communication materials are not available electronically, you will receive the standard printed materials in the mail with no announcement made by email.

Brokerage accounts carried by First Clearing, LLC, Member FINRA/SIPC. First Clearing, LLC is a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

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[E-mail](#) [Delivery Preferences](#) [Change Security Questions And Answers](#)

Go Paperless

To turn off paper delivery:

- Click the checkboxes for each account and document type for which you want to turn off paper delivery. To turn off paper delivery for a document type (i.e., Trade Confirms) for all accounts, click the "Select All" link under that document title. To turn off paper delivery for all document types for all of your accounts with one click, click the "Go Paperless" checkbox.
- Online delivery of Shareholder Communications requires the use of a PIN to vote your proxy shares online. Please create a 4-digit number for your PIN. This PIN will only be used to vote your proxy shares and is not tied to any of your financial accounts or check cards.
- Select an email address to which you would like to receive email notifications. You will receive an email notification when the account document becomes available online. If there is more than one owner on an account, you have the choice to receive the email notification or not.
- Click the "Save" button.

To turn paper delivery back on:

- Uncheck the boxes for each account and document type for which you want to turn paper delivery back on.
- Click the "Save" button.

[Go To Account Statements](#)

Go Paperless						
Account Name	Account Number	Statements	Trade Confirms	Tax Docs/1099s	Shareholder Communications	Email Alerts
		Select All	Select All	Select All	Select All	
Brokerage	*1234	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Create New Shareholder Communications PIN (4 digits): [What's This?](#)

Email Address For Notifications: client@test.com [Modify](#) [Add Email Address](#)

For assistance, contact Access Online Support at **1-877-488-3748**.