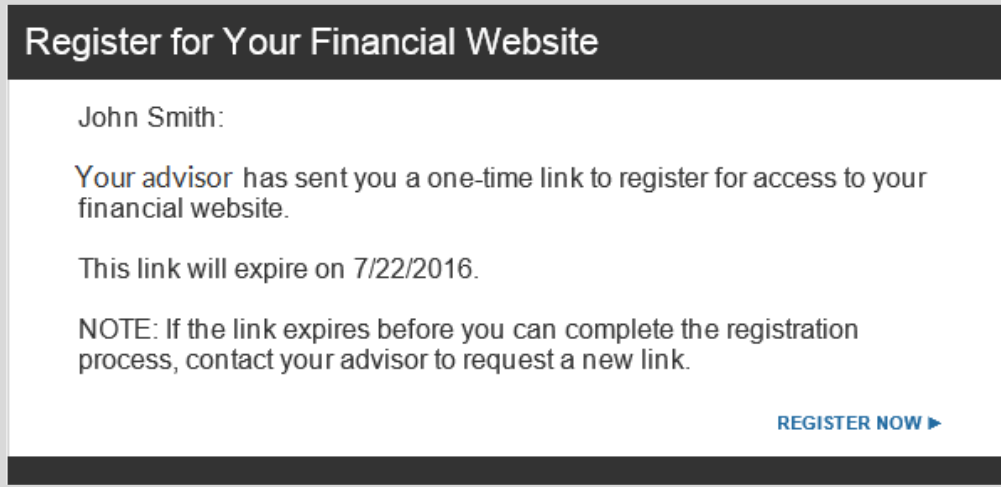


# Website Registration Process

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.



**Register for Your Financial Website**

John Smith:

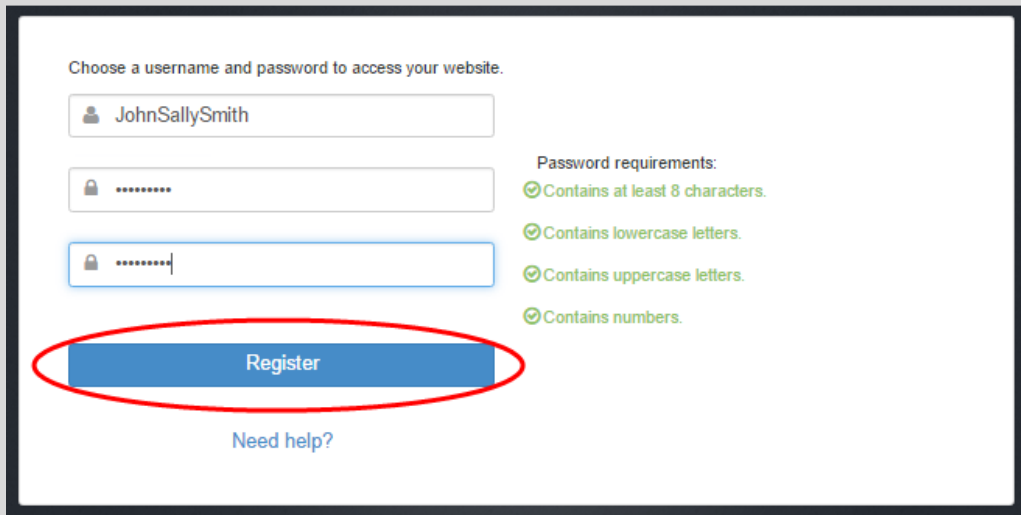
Your advisor has sent you a one-time link to register for access to your financial website.

This link will expire on 7/22/2016.

NOTE: If the link expires before you can complete the registration process, contact your advisor to request a new link.

[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.



Choose a username and password to access your website.

Register

[Need help?](#)

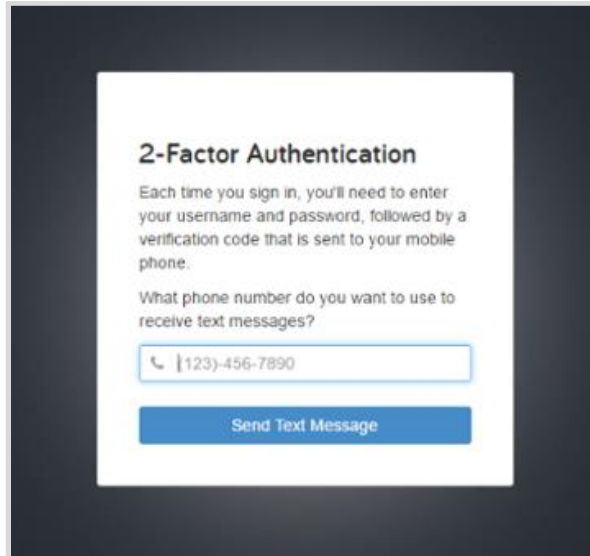
Password requirements:

- ✔ Contains at least 8 characters.
- ✔ Contains lowercase letters.
- ✔ Contains uppercase letters.
- ✔ Contains numbers.

# Website Registration Process

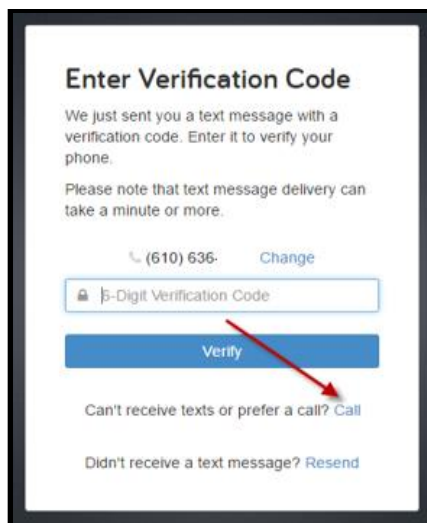
3. After establishing your Username and Password, you are required to register for 2-Factor Authentication (2-FA.) The main purpose of 2-FA is to ensure the security of your information. 2-FA will verify your identity using a PIN sent to your phone. This is an important measure in safeguarding your personal 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 rectangular form centered on a dark background. At the top, the heading "2-Factor Authentication" is displayed. Below it, a paragraph explains that users will need to enter their username and password followed by a verification code sent to their mobile phone. A question asks for the phone number to use for text messages. A text input field contains the number "(123)-456-7890". Below the input field 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 rectangular form centered on a dark background. The heading "Enter Verification Code" is at the top. A paragraph states that a text message with a verification code was just sent and that users should enter it to verify their phone. A note mentions that text message delivery can take a minute or more. Below this, a phone number "(610) 636-" is shown with a "Change" link next to it. A text input field with a lock icon is labeled "6-Digit Verification Code". Below the input field is a blue button labeled "Verify", with a red arrow pointing to it from the "Call" link below. At the bottom, there are two links: "Can't receive texts or prefer a call? Call" and "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...

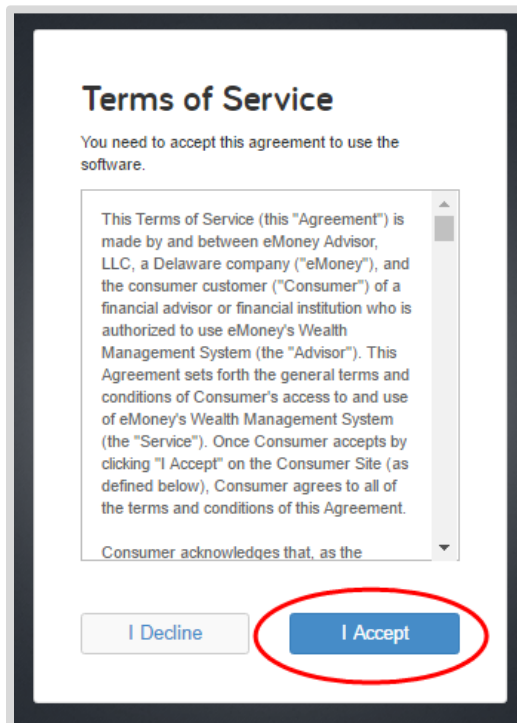
Answer

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!

