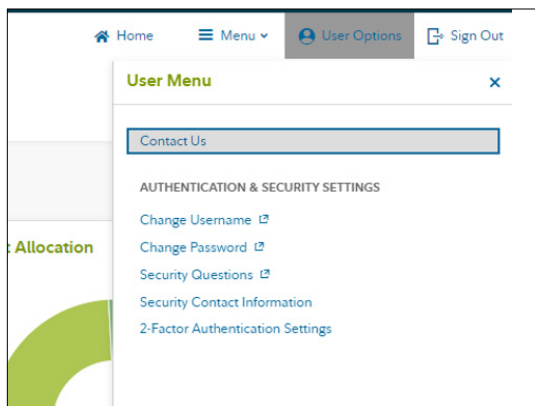


WEALTHSCAPE INVESTOR: HOW TO RESET A PASSWORD

How to Change a Password Inside of Wealthscape Investor

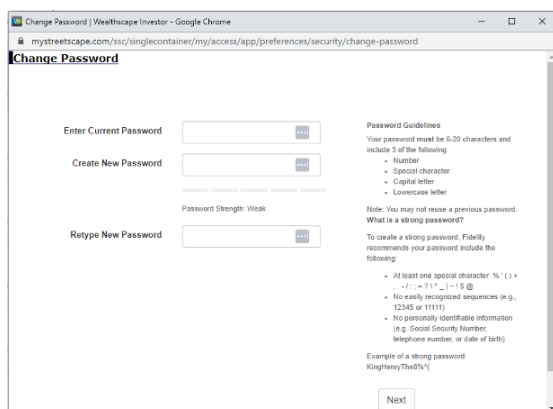
Clients can use the following instructions to change their Wealthscape InvestorSM password.

1. Select User Options > Change Password



2. Change Password

- Enter the password used to sign in to Wealthscape Investor in the **Enter Current Password** field
- Enter a new password by following the 'Password Guidelines' in the **Create New Password** field
- Enter the new password again in the **Retype New Password** field and select **Next**

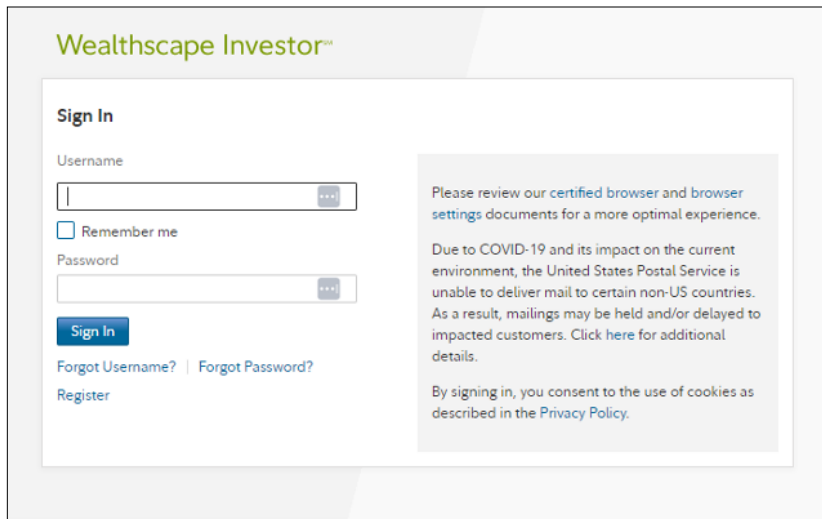


3. The message 'Your password has been successfully changed' will display and confirms the password was changed.

How to Reset a Password from Forgot Password

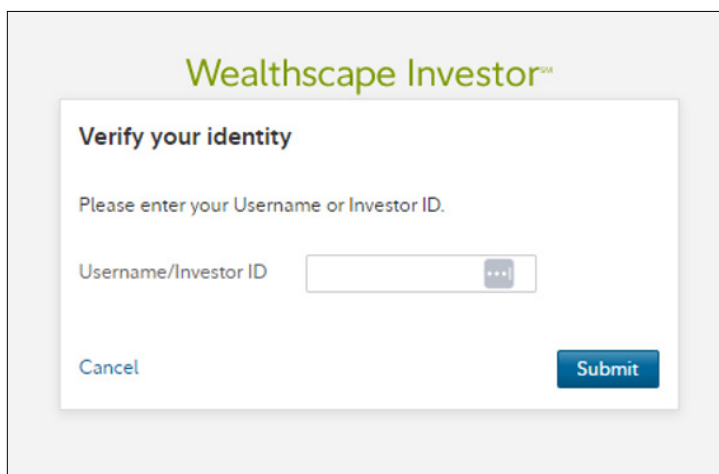
If a client enters their current password incorrectly three times or if they do not know their current password, they can follow these instructions to reset their password.

1. On the Wealthscape Investor Sign In page, select **Forgot Password?**



The screenshot shows the Wealthscape Investor Sign In page. The page title is "Wealthscape Investor". Below the title is a "Sign In" section with a "Username" input field, a "Remember me" checkbox, and a "Password" input field. A blue "Sign In" button is located below the password field. Below the button are links for "Forgot Username?", "Forgot Password?", and "Register". To the right of the sign-in fields is a grey box containing two paragraphs of text. The first paragraph says: "Please review our [certified browser](#) and [browser settings](#) documents for a more optimal experience." The second paragraph says: "Due to COVID-19 and its impact on the current environment, the United States Postal Service is unable to deliver mail to certain non-US countries. As a result, mailings may be held and/or delayed to impacted customers. [Click here](#) for additional details." Below this text is a line: "By signing in, you consent to the use of cookies as described in the [Privacy Policy](#)."

2. Enter either the Username or Investor ID and select **Submit**



The screenshot shows the Wealthscape Investor "Verify your identity" page. The page title is "Wealthscape Investor". Below the title is a "Verify your identity" section with the text "Please enter your Username or Investor ID." Below this text is a "Username/Investor ID" input field. At the bottom left of the form is a "Cancel" button, and at the bottom right is a blue "Submit" button.

3. Select either **Text me** or **Call me**, and select **Continue**

The screenshot shows the 'Wealthscape Investor' login interface. At the top, it says 'Wealthscape Investor'. Below that, a green heading reads 'Extra Security Step Required'. The user's 'Username/Investor ID' is 'Cambridge2108'. A message states: 'For extra protection, we ask that you enter a one-time code that we will send via text or automated call. Select how you would like to receive this code.' Under the 'Text me' section, the option 'Use (xxx) xxx-0510' is selected with a radio button. There is also a 'Call me' option. At the bottom, there is a 'Cancel' link and a blue 'Continue' button.

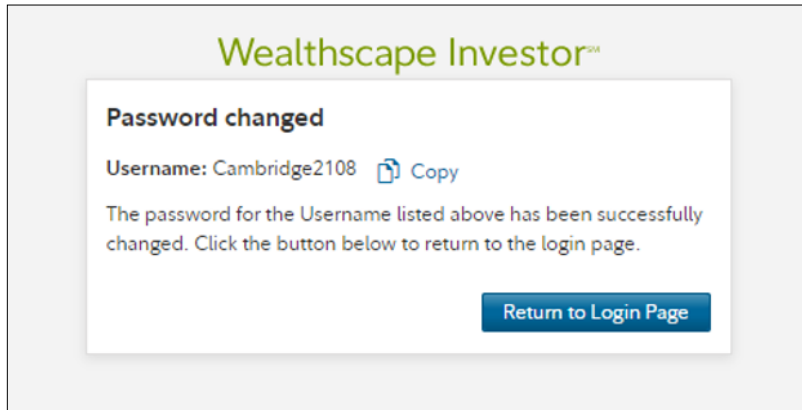
4. Enter the security code received and select **Submit**

The screenshot shows the 'Wealthscape Investor' interface. A green heading reads 'We sent you a text message'. The user's 'Username/Investor ID' is 'Cambridge2108'. A message states: 'Look for the security code we just sent you to (xxx) xxx-0510 and enter it below.' There is a text input field for the 'Security Code'. Below the field, it says 'Code expires in 30 minutes. Didn't get the code? Request another one.' At the bottom, there is a 'Cancel' link and a blue 'Submit' button.

5. On the **Reset your password** window, follow the guidelines to enter a new password. Green check marks display as the password satisfies each guideline.

The screenshot shows the 'Wealthscape Investor' password reset interface. A green heading reads 'Reset your password'. The user's 'Username/Investor ID' is 'Cambridge2108'. There is a text input field for 'Create a new password'. Below it, the password strength is shown as 'Weak' with a question mark icon. A note says 'Letters are case-sensitive.' A list of requirements is shown with red 'X' marks indicating they are not met: '6 - 20 characters', 'Upper and lower case letters', 'At least one number', and 'Special characters except for #&*-<[]''. There is a text input field for 'Confirm your password'. At the bottom, there is a 'Cancel' link and a blue 'Submit' button.

6. In the **Confirm your password** field, enter the new password again
7. Select **Submit**
8. On the **Password changed** window, to save the Username/Investor ID onto your computer's clipboard, select **Copy**. Both the Username and Investor ID display if the client has created a custom Username.



9. Select **Return to Login Page**. Shortly, the client receives an email to ensure they know someone reset their password.

