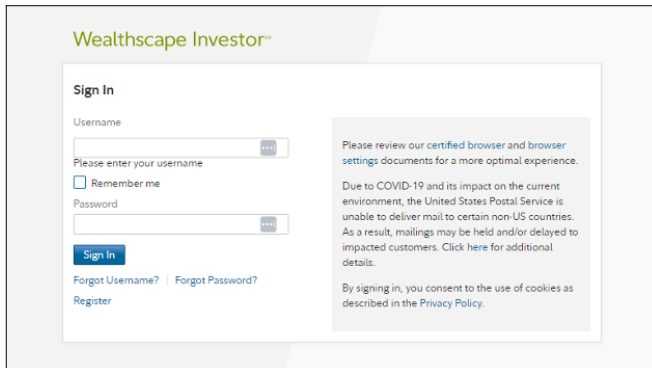


WEALTHSCAPE INVESTOR: HOW TO RETRIEVE AND RESET A USERNAME

How to Retrieve a Username

Clients will be asked to provide their first name, last name, date of birth, and the last four digits of their Social Security number (SSN). Clients who maintain relationships with multiple firms will be asked to provide an account number.

1. Select **Forgot Username?** on the Wealthscape InvestorSM Sign In page.



Wealthscape InvestorSM

Sign In

Username

 Please enter your username

Remember me

Password

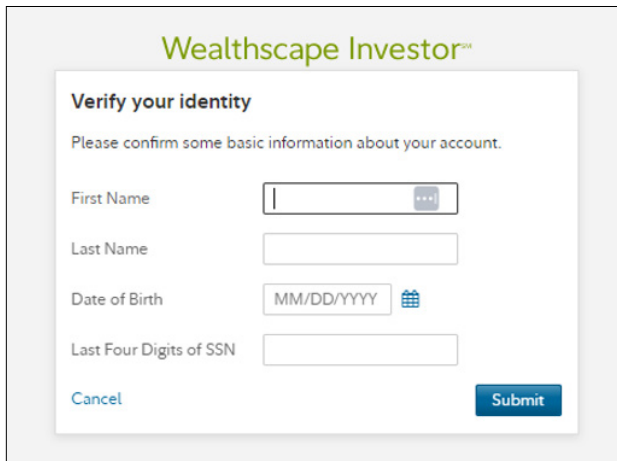
[Forgot Username?](#) | [Forgot Password?](#)
[Register](#)

Please review our certified browser and browser settings documents for a more optimal experience.

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.

By signing in, you consent to the use of cookies as described in the Privacy Policy.

2. Under Verify your identity enter:
 - First Name
 - Last Name
 - Date of Birth
 - Last Four Digits of SSN




Wealthscape InvestorSM

Verify your identity

Please confirm some basic information about your account.

First Name

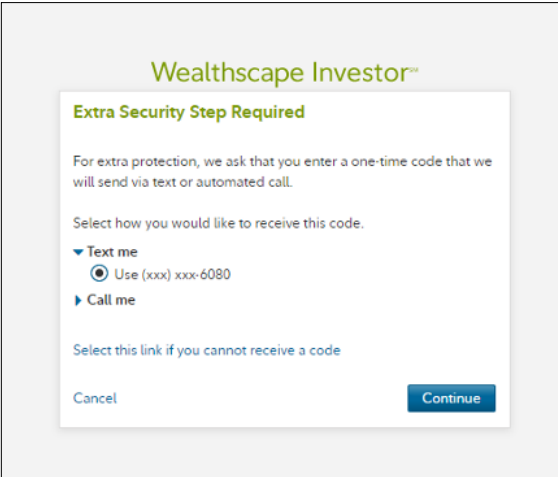
Last Name

Date of Birth 

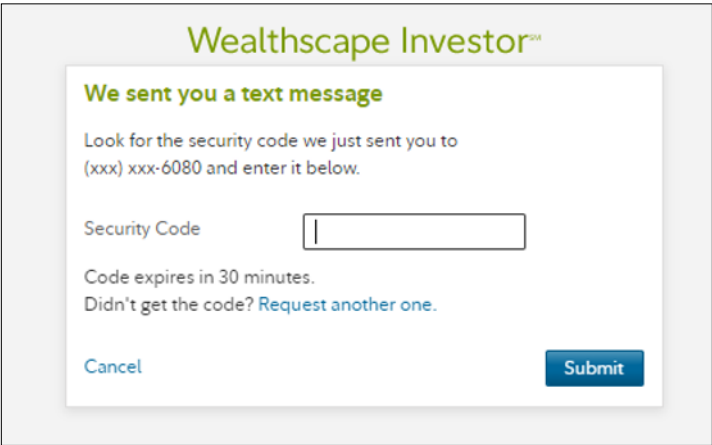
Last Four Digits of SSN

[Cancel](#)

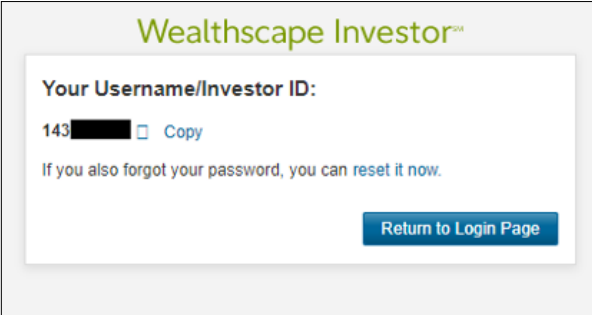
- 3. Request a one-time code via text or call. This will be sent to the phone number provided in the Security Contact Information.



- 4. Enter the security code.



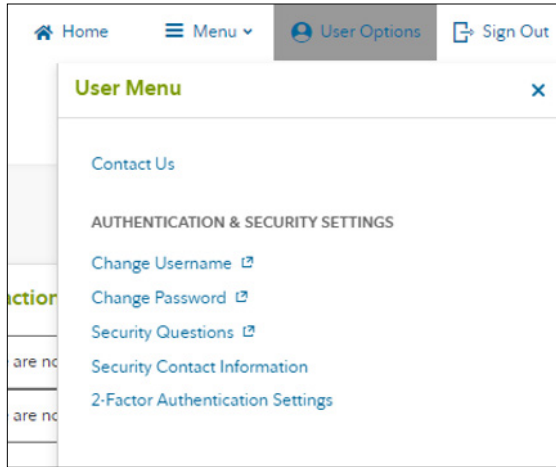
- 5. Username/Investor ID is displayed.



How to Create or Change a Username

Clients can use the following steps to create or change their Username to use instead of an Investor ID.

1. In Wealthscape Investor, select **User Options > Change Username**.



2. In the 'Enter New Username' field, enter a new Username using the following guidelines:

Username Guidelines

- Use 9 to 15 letters and/or numbers
- Your username must contain at least one letter
- Do *not* use one entire piece of personally identifiable information such as your Social Security number, telephone number, or date of birth. Instead, alter or disguise it (e.g., Jane212Smith)
- Do *not* use 5 or more instances of a single number or letter, or easily recognized sequences (e.g., 12345 or 11111)
- Do *not* use symbols, punctuation marks, or spaces (e.g., #, @, /, *, -)

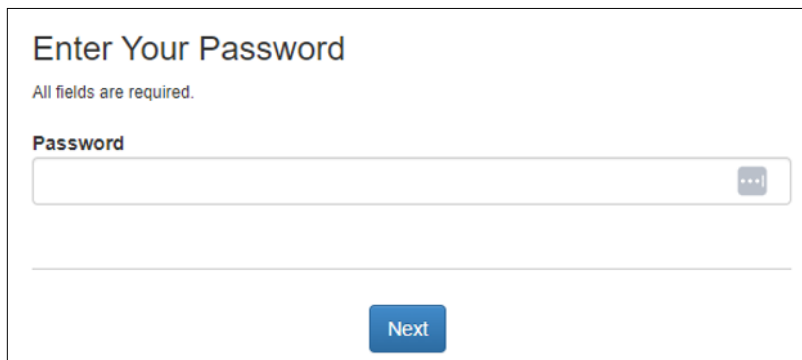
3. Select **Check Availability**. If the Username is not available, repeat steps 2 and 3. If the Username is available, a confirmation message will display.

Create Your New Username

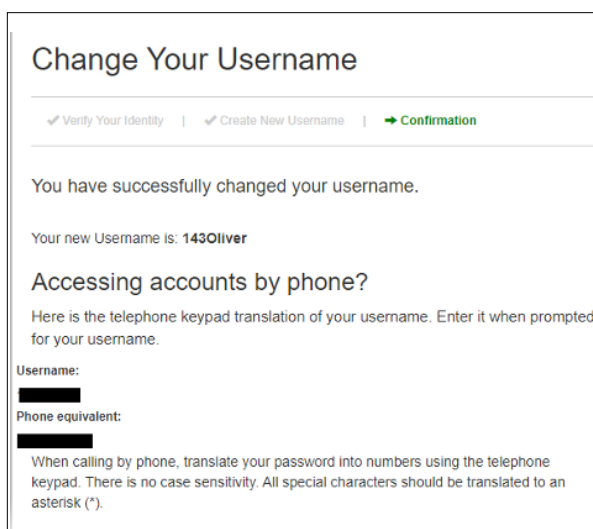
All fields are required.

Enter New Username

4. Enter the password and select **Next**.



5. The following confirmation screen will appear.



6. Shortly after the client makes the update, they will receive one of these emails:
- A 'Creation of a New Custom Username' email to ensure they know someone created a custom Username to use in place of their user ID
 - A 'Modification to Your Login ID' email to ensure they know someone changed their custom Username

