

WEALTHSCAPE INVESTOR FREQUENTLY ASKED QUESTIONS

Where can investors access Wealthscape InvestorSM?

Investors can login or register directly at www.wealthscapeinvestor.com or by downloading the Wealthscape Investor mobile app available in the Apple App Store or Google Play Store.

What accounts does an investor have access to?

Investors will have access to their National Financial Services (NFS) brokerage accounts held through Cambridge Investment Research, Inc.

Can investors reset their own password?

Yes, they can follow the Forgot Password process by selecting **Forgot Password?** on the sign in page.

Is there 2-Factor Authentication?

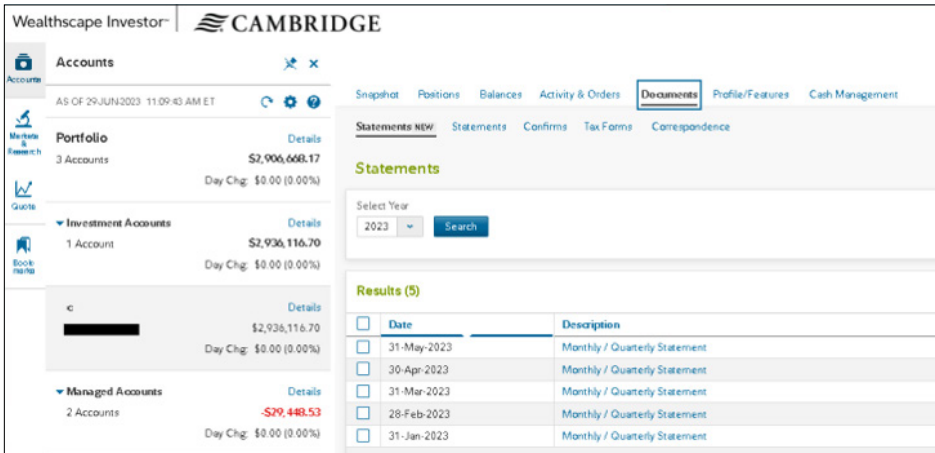
Yes, it is currently optional. As of October 1 2023, it will be mandatory.

What type of account documents will the investor have access to?

- Account Statements
- Trade Confirms
- Correspondence
- Tax Documents

Where can the documents in Wealthscape Investor be found?

Select **Accounts > Details > Documents**.



Wealthscape Investor | CAMBRIDGE

Accounts | AS OF 29-JUN-2023 11:09:43 AM ET | Snapshot | Positions | Balances | Activity & Orders | **Documents** | Profile/Features | Cash Management

Statements NEW | Statements | Confirms | Tax Forms | Correspondence

Statements

Select Year: 2023 [Search]

Results (5)

| <input type="checkbox"/> | Date | Description |
|--------------------------|-------------|-------------------------------|
| <input type="checkbox"/> | 31-May-2023 | Monthly / Quarterly Statement |
| <input type="checkbox"/> | 30-Apr-2023 | Monthly / Quarterly Statement |
| <input type="checkbox"/> | 31-Mar-2023 | Monthly / Quarterly Statement |
| <input type="checkbox"/> | 28-Feb-2023 | Monthly / Quarterly Statement |
| <input type="checkbox"/> | 31-Jan-2023 | Monthly / Quarterly Statement |

Where can investors set up electronic delivery?

Select **Menu > Document Delivery Instructions**. Electronic delivery options are setup per account. Note: Communications sent directly from Cambridge and/or sponsor documentation will not apply.

What browsers and operating systems are supported?

Browsers:

- Microsoft Edge 113
- Google Chrome 113
- Mozilla Firefox 113
- Apple Safari 16.3

Operating Systems:

- Microsoft Windows 10
- Apple Mac OS X
- Apple iOS13+
- Android OS 10+

