

Wealthscape InvestorSM: IDs, Passwords, and Usernames

Overview

Several features are available in Wealthscape InvestorSM to assist the end investor, where entitled, with their login credentials:

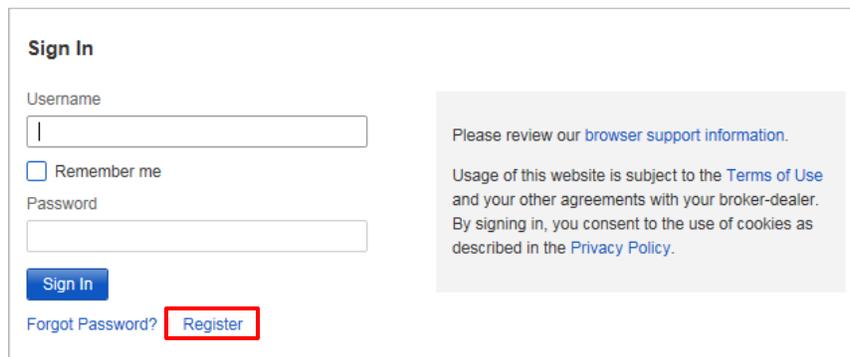
- [Register for a New User ID](#)
- [Change a Username](#) **NEW**
- [Change a Password](#)
- [Forgot/Reset a Password](#)
- [Remove a Saved ID](#)

Register for a New User ID

The Wealthscape Investor new user registration feature enables the end investor to self-register for access without assistance from your firm; thus, the ability to obtain a user ID and establish a password themselves.

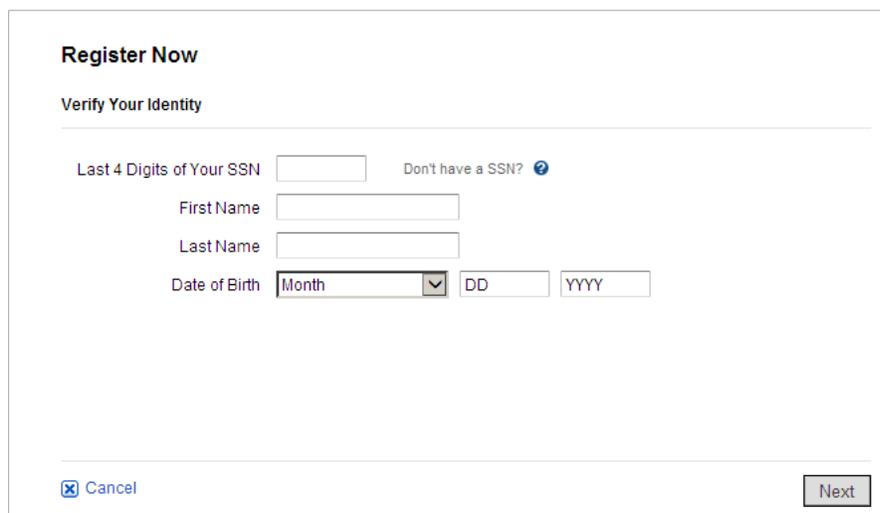
Prior to attempting to register for a new user ID, the end investor must be prepared with his or her active National Financial Services LLC (NFS) brokerage account number.

1. On the Wealthscape Investor Login page, select **Register**.



The screenshot shows the 'Sign In' page. It includes a 'Username' input field, a 'Remember me' checkbox, and a 'Password' input field. A blue 'Sign In' button is present. Below the button are links for 'Forgot Password?' and 'Register'. The 'Register' link is highlighted with a red box. To the right of the form is a grey box containing text: 'Please review our [browser support information](#). Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#).'

The Register Now window prompts the user to verify his or her identity.



The screenshot shows the 'Register Now' page under the heading 'Verify Your Identity'. It contains several input fields: 'Last 4 Digits of Your SSN' (with a 'Don't have a SSN?' link), 'First Name', 'Last Name', and 'Date of Birth' (with a dropdown for 'Month' and separate boxes for 'DD' and 'YYYY'). At the bottom left is a 'Cancel' button with a checked checkbox, and at the bottom right is a 'Next' button.

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2. Enter the following:
 - Last four digits of their Social Security number (SSN)
 - First and Last Name
 - Date of Birth
3. Select **Next**.
4. Enter the nine-digit Wealthscape Investor account number, and select **Next**.
5. Enter a new password by following the Password Guidelines, and then select a security question and answer (SQA) information.
6. Select **Next**.

A Confirmation window states that the registration was successful and provides the 10-digit user ID. The end investor can print the confirmation page by selecting the **Print** icon.

7. Select **Continue to Home Page** to proceed directly to the landing page.

Change a Password

The end investor can change the password associated with his or her user ID or username. The user ID and password uniquely identify each user and ensure secure access to that user's authorized brokerage accounts.

A user has up to five attempts to enter the correct password when logging into Wealthscape Investor. After the fifth failed attempt, the password becomes deactivated.

NOTE

If a password becomes deactivated, end investors must contact their broker-dealers to have the password reset.

1. Select **Settings > Change Password**.
2. In the Enter Current Password box, enter the password used to log in for the current session.

Enter Current Password

Create New Password

Retype New Password

Password Strength: Weak

Password Guidelines

Your password must be 6-20 characters.
Note: You may not reuse a previous password.

What is a strong password?

To create a strong password, Fidelity recommends your password include the following:

- At least one special character: % ' () + , . - / : ; = ? \ ^ _ | ~ ! \$ @
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g. Social Security Number, telephone number, or date of birth)

Example of a strong password:
KingHenryThe8%^(

Next

3. In the Create New Password box, enter a new password that conforms with the Password Guidelines.
4. In the Retype New Password box, enter the new password again.
5. Select **Next**.

A message confirms that the password has been successfully changed. The end investor must use this new password the next time he or she logs in to Wealthscape Investor.

Change a Username

End investors can create a custom username to represent their 10-digit user ID for use in logging into Wealthscape Investor and Wealthscape Investor Mobile Apps.

NOTE

If the end investor creates a custom username, he or she will be required to login using the new Wealthscape Investor Login page; Mobile App users will be required to download and login with the new Wealthscape Investor App. End investors will not be able to login to the legacy myStreetscape Login page or Mobile App using a custom username.

1. Select **Settings > Change Username**.

The end investor can refer the on-screen guidelines for choosing a valid username.

2. In the Enter New Username field, enter the new username.

3. Select **Check Availability** to ensure that the username has not already been taken.

- If the username is not available, a message displays. Repeat from step 2.
- If the username is available, a confirmation message displays.

The screenshot shows two sections of a user interface. The top section is titled "Create Your New Username" and includes a sub-header "All fields are required." Below this, there is a label "Enter New Username" next to a text input field containing "Username1". To the right of the input field is a red-bordered box titled "Username Guidelines" which lists four rules: 1. Use 9 to 15 letters and/or numbers. 2. Your username must contain at least one letter. 3. 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). 4. Do not use 5 or more instances of a single number or letter, or easily recognized sequences (e.g., 12345 or 11111). 5. Do not use symbols, punctuation marks, or spaces (e.g., #, @, /, *, -,). Below the input field is a green message: "The username selected is available" and a "Check Availability" button. The bottom section is titled "Enter Your Password" and also includes "All fields are required." It features a "Password" label next to an empty password input field. A mouse cursor is visible over the right side of the password field. At the bottom center of the form is a blue "Next" button.

4. Enter the login password in the Password box.

5. Select **Next**.

6. Select **Continue to Home Page** (not shown) to return to the Wealthscape Investor Home Page.

Forgot/Reset Password

The end investor is able to reset his or her own password without assistance from your firm.

1. On the Wealthscape Investor Login page, select **Forgot Password**.

The screenshot shows the 'Forgot/Reset Password' page. At the top, there is a progress bar with four steps: 'Enter Your User ID' (active), 'Answer Your Security Question', 'Create New Password', and 'Finish'. Below the progress bar, there is a text input field labeled 'User ID'. At the bottom of the form, there is a 'Cancel' button with a close icon and a 'Next' button.

2. Enter either the Wealthscape Investor user ID or username, and select **Next**.

The screenshot shows the 'Forgot/Reset Password' page. The progress bar now shows 'Enter Your User ID' as completed and 'Answer Your Security Question' as active. Below the progress bar, there is a text input field with the question 'What is the name of your best friend from high school?'. At the bottom of the form, there is a 'Cancel' button with a close icon and a 'Next' button.

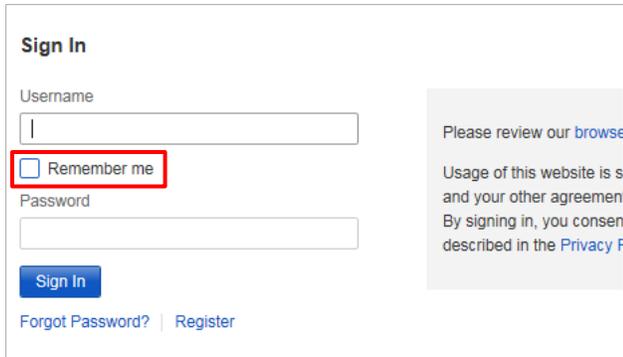
3. If a security question is on file, enter the answer to the security question.
or
If a security question is not on file, a message instructs the user to enter his or her user ID and password on the login window or to contact your firm to reset the password (not shown).
4. In the Create New Password box, enter a new password that conforms with the Password Guidelines.
5. In the Retype New Password box, enter the new password again.
6. Select **Next**. A message confirms that the user has successfully reset the password.

The screenshot shows the 'Forgot/Reset Password' page. The progress bar now shows all three previous steps as completed and 'Finish' as active. Below the progress bar, there is a message: 'You have successfully reset your password'. At the bottom right of the form, there is a 'Continue to home page' button with a right-pointing arrow.

7. Select **Continue to home page** to proceed directly to the landing page.

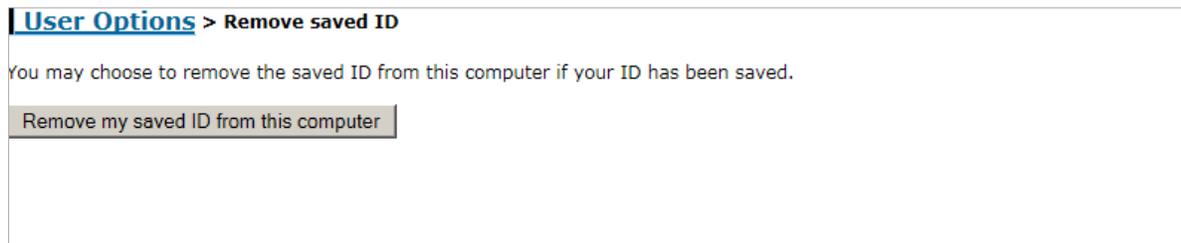
Remove a Saved ID

The end investor can remove a saved ID from the Wealthscape Investor Login page if they previously chose the "Remember me" indicator:



The screenshot shows the 'Sign In' form on the Wealthscape Investor website. It includes a 'Username' field, a 'Remember me' checkbox (highlighted with a red box), and a 'Password' field. Below the password field is a blue 'Sign In' button. At the bottom left, there are links for 'Forgot Password?' and 'Register'. On the right side, there is a grey box containing text: 'Please review our [browse](#) Usage of this website is s and your other agreemen By signing in, you consen described in the [Privacy F](#)'.

1. Select **Settings > Remove My Saved ID**.



The screenshot shows the 'User Options > Remove saved ID' page. It contains the text: 'You may choose to remove the saved ID from this computer if your ID has been saved.' Below this text is a button labeled 'Remove my saved ID from this computer' which is highlighted with a grey box.

2. Select **Remove my saved ID from this computer**.