Overview
Several features are available in Wealthscape Investor<sup>SM</sup> to assist the end investor, where entitled, with their login credentials:

- **Register for a New User ID**
- **Change a Username**
- **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 Register Now window prompts the user to verify his or her identity.
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.
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.

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**.

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

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.

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:

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

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