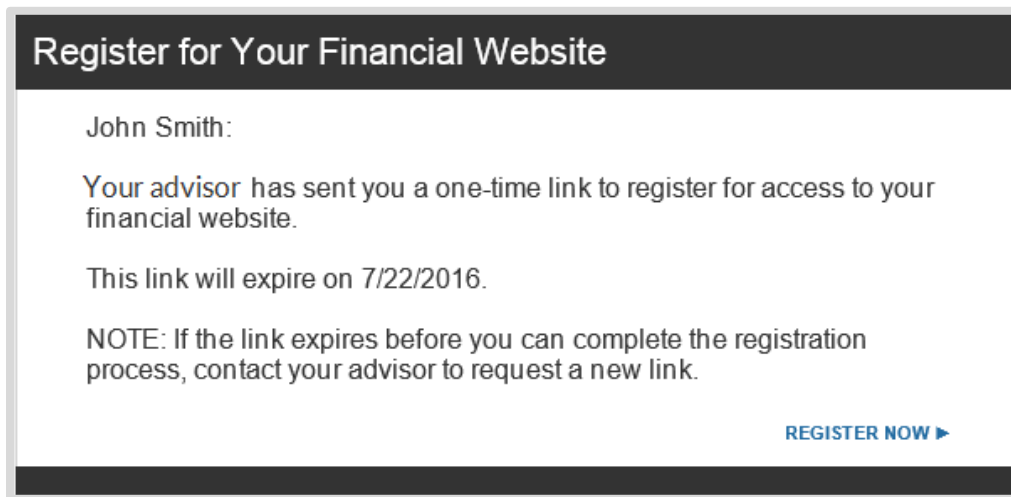


Website Registration Process

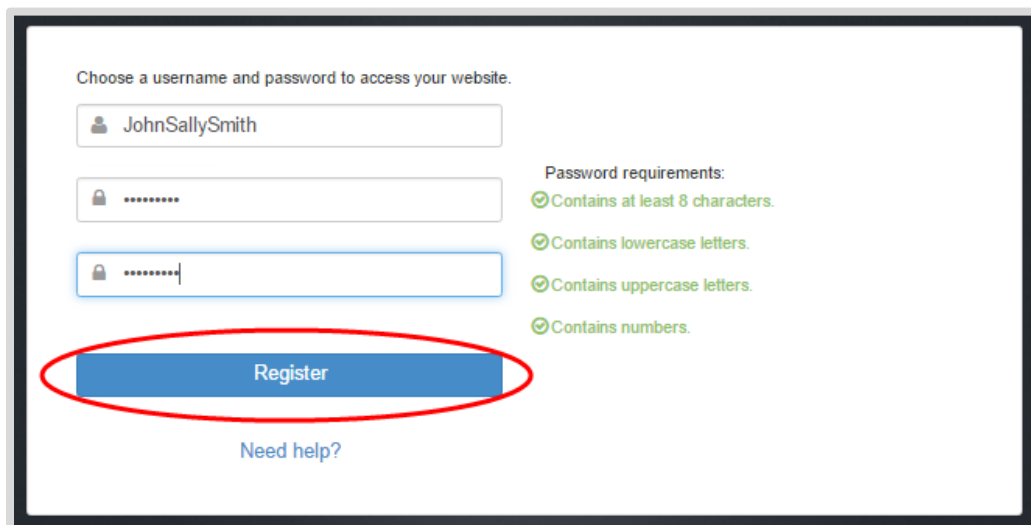
In this userguide, we will demonstrate how to register your website in a few simple steps! Your financial representative will send a system generated email with an embedded registration link. For your security, this link has redemption codes built into it. This means that the link you received is one time only use. Once the link has been clicked on, it will then expire. Make sure not to click the link until you are fully ready to complete the registration process! Registration should take no more than 10 minutes.

Please Note: The registration invitation email expires 7 days from initial receipt. If you delete the email, your financial representative will be able to resend it.

1. From your email, open the invitation email.



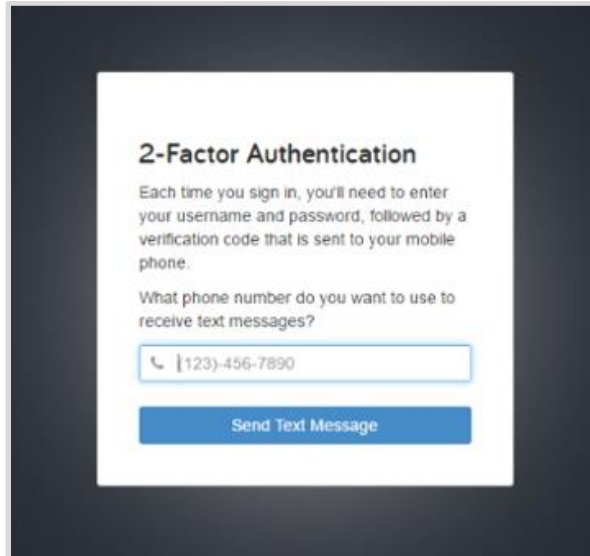
2. The link will open a new page in your default internet browser. Here you will establish a unique Username & Password. Follow the password meter to confirm you have met the security requirements.



Website Registration Process

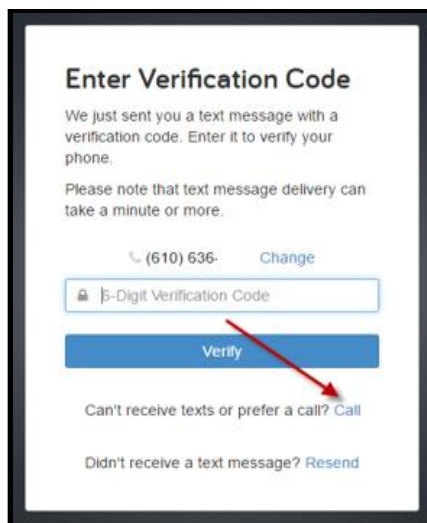
3. After establishing your Username and Password, you are required to register for 2-Factor Authentication (2-FA.) The main purpose of 2-FA is to ensure the security of your information. 2-FA will verify your identity using a PIN sent to your phone. This is an important measure in safeguarding your personal financial data, a matter we take very seriously.

You will first register your Primary phone to be used for 2-FA. Enter your phone number and click **Send Text Message**. If you enter a landline, you can choose to receive a phone call that reads your PIN to you. For international phones, add a “+” in front of your number.



The screenshot shows a white form titled "2-Factor Authentication" on a dark background. The text explains that users will need to enter a verification code sent to their mobile phone. It asks for a phone number to receive text messages. A text input field contains the number "(123)-456-7890". Below the input field is a blue button labeled "Send Text Message".

4. Once you have received your PIN, enter the 6 digit code into verification box and click **Verify**. Click the Call link to have the verification code read to you over a phone call. The code expires after 10 minutes, click the Resend link to receive a new PIN verification code.



The screenshot shows a white form titled "Enter Verification Code" on a dark background. It instructs the user to enter a 6-digit verification code received via text message. It notes that text message delivery can take a minute or more. There is a phone number "(610) 636-" with a "Change" link next to it. A text input field is labeled "6-Digit Verification Code". Below the input field is a blue button labeled "Verify". A red arrow points from the "Verify" button to a link that says "Can't receive texts or prefer a call? Call". At the bottom, there is a link that says "Didn't receive a text message? Resend".

Website Registration Process

- Next you will be prompted to set up a recovery phone. This number will be used if you do not have access to your primary phone while trying to login.

Setup 2-Factor Recovery Phone

Set up a recovery phone so that you can access the system if you cannot receive verification codes on your primary number. You can choose to skip this now and be reminded in 30 days.

What phone number do you want to use as a recovery phone? Please note this number cannot be the same as your primary 2-factor phone number.

(610) 234-

Submit

[Skip this for now](#)

- Next, you will be prompted to answer 3 security questions.

Security Questions

You will be asked one of these questions when logging in from a device for the first time or to reset your password if you forget it.

Question 1 of 3

Set a question...

Answer

Confirm Answer

Question 2 of 3

Set a question...

Answer

Confirm Answer

Question 3 of 3

Set a question...

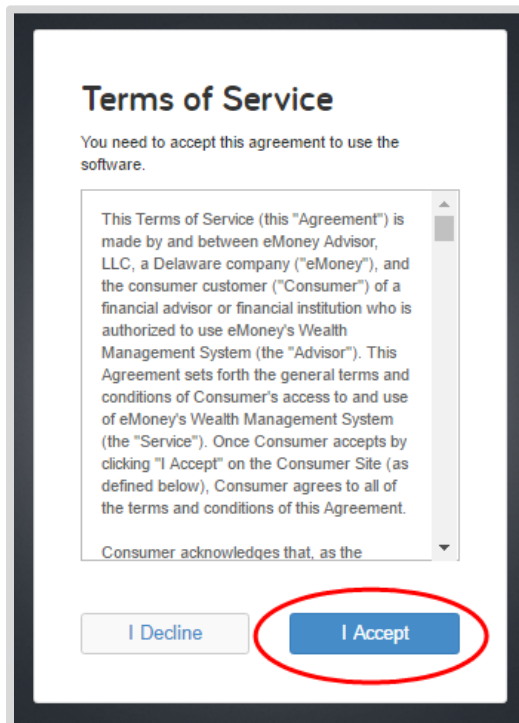
Answer

Confirm Answer

Continue

Website Registration Process

7. Finally, read and accept the Terms of Service.



8. Once you have successfully registered for your website, you will receive a confirmation email as shown below. Save the log on link to your bookmarks for easy access!

