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.

Register for Your Financial Website
John Smith:
Your advisor has sent you a one-time link to register for access to your financial website.
This link will expire on 7/22/2016.
NOTE: If the link expires before you can complete the registration process, contact your advisor to request a new link.
REGISTER NOW ►

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.

Choose a username and password to access y		
	Password requirements:	
·····		
	Ocontains lowercase letters.	
······	⊘ Contains uppercase letters.	
	Ocontains numbers.	
Register		
Need help?		

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.

-	
Eac	Factor Authentication h time you sign in, you'll need to enter r username and password, followed by a ication code that is sent to your mobile ne.
	It phone number do you want to use to rive text messages?
¢	123)-456-7890
	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.

Ent	er Verifi	cat	ion Co	de
	st sent you a to ation code. En		100 M	
	e note that tex minute or mo		sage delive	ry can
	·- (610) 63	6.	Change	
e	i-Digit Verificat	tion C	ode	
		Verily	1	
Car	n't receive text	ts or p	orefer a cal	P Call
Did	n't receive a te	ext m	essage? R	esend

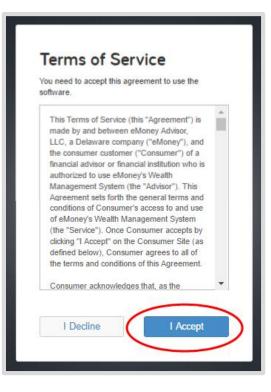
5. Next you will be prompted to set up a recovery phone. This number will be used if you do not have access to your primary phone while trying to login.

acce verifi You	up a recovery phone so that you can ses the system if you cannot recieve cation codes on your primary number. can choose to skip this now and be nded in 30 days.
a rei cani	It phone number do you want to use as covery phone? Please note this number not be the same as your primary ctor phone number.
C	(610) 234
2	Submit

6. Next, you will be prompted to answer 3 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.			
uestion 1 of 3			
Set a question			
Answer			
Confirm Answer			
Answer			
Set a question			
Confirm Annuar			
Confirm Answer			
Confirm Answer			
Juestion 3 of 3	,		
uestion 3 of 3 Set a question			

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!

