Kingston Wealth Management Group, LLC

Advisor Group IN YOUR CORNER

Wealthscape Investor℠:

Easy Online Access to Your Account Information

Your Wealthscape Investor portal is the online source for your investment account information.

With it, you have access to:

- Position details
- Balances
- Order status
- History
- 10-year statement access
- Trade confirmation for up to 7 years

Plus, Wealthscape Investor provides:

- Watch lists
- Portfolio watch
- Research and market tools

All of this can be accessed any time from the convenience of your personal computer or mobile device.

Internet Security

Your account is protected by top-of-the-line VeriSign Secure Sockets Layer (SSL) security, developed specifically for transmitting private documents via the Internet. SSL uses a private key to encrypt data that is transferred over the SSL connection. All compatible browsers support SSL, to view confidential user information, such as financial data.

Websites that require an SSL connection often start with *https:* instead of *http:* and/or display a padlock icon on the page.

Additionally, a 128-bit encryption process is used to securely exchange your information, offering certified security.

Mobile Access

Your Wealthscape Investor ID is accessible on the iPad®, iPhone®, and Android™ phones and tablets, as well as other mobile devices.

Download the **Wealthscape Investor app** from the Apple App Store® or Google Play Store™, and then use your login credentials to view your account information wherever and whenever you want. Other mobile devices can utilize the mobile website.

MOBILE CHECK DEPOSIT:

Deposit checks using the Wealthscape Investor mobile app on your smartphone or tablet.

Paperless Statements & Confirmations

You can go green and update your delivery instructions from U.S. mail to electronic delivery for several document types. Electronic delivery – or eDelivery – will notify you by email when a document is ready to be viewed online.

FOLLOW THESE SIMPLE INSTRUCTIONS:

1. Log into www.wealthscapeinvestor.com and click the **Service** tab, then **Document Delivery Instructions**.
2. Click **Add Email** to add account holder email addresses and follow the instructions. Once all emails for account holders have been added, click **Apply**.
3. Change the delivery instructions for the documents you want eDelivered and click **Save This Account**.
4. Read and acknowledge the agreement on the next window by clicking **I Agree**.
5. If there are multiple accounts, repeat steps 2-4 for each account.

Getting Started

1. Register and create your user ID and password online by going to www.wealthscapeinvestor.com.
2. Just click on the **Register** link to get started, then follow the provided instructions.
3. You must have an **account number** on hand to register online. If you were given a user ID and an initial password, you must update the password when you first log in.
4. Go to www.wealthscapeinvestor.com, enter your credentials and follow the instructions to change your password and set up your security questions and answers.

CHANGING YOUR LOGIN ID:

You can create a custom username to log in to the Wealthscape Investor site and Wealthscape Mobile App. After logging in with your ten-digit login ID, click the **Settings – Change Username** option and enter a custom username using the on-screen guidelines. Enter your password, then select **Next**. Use your new username from this point forward.

TO RESET YOUR PASSWORD:

If you lose or forget your password, use the **Forgot Password?** feature on the www.wealthscapeinvestor.com site. To self-reset your password, you must have your security questions and answers set up.

Desktop Browser & Operating System

Wealthscape Investor is compatible with Windows® Internet Explorer, Mozilla Firefox®, Google Chrome™, and Apple Safari®. Be sure to use the most up-to-date version of browser and operating systems, as continued use of older versions may result in warnings or your browser being blocked.

RECOMMENDED PLUG-IN:

Adobe® Reader

MOBILE ACCESS & SMART PHONE APP:

Wealthscape Investor is compatible with the latest versions of iPhone® and iPad® iOS or Android devices.

Download Wealthscape Investor Account Info into Quicken®, Turbo Tax®, & H&R Block®

- In Quicken, choose Wealthscape Investor from the account provider menu.
- In TurboTax or H&R Block, select National Financial as your brokerage services firm during your filing's import steps.

For all applications, use your user ID and current password. If you have additional questions, contact your financial professional.