

A photograph of three business professionals in a modern office setting. A man in a grey suit and tie is leaning over a desk, smiling and looking at a tablet. A woman with blonde hair, wearing a teal blouse, is sitting at the desk and looking at the tablet. Another woman with dark curly hair, wearing a light-colored blazer, is standing behind her, also smiling and looking at the tablet. A computer monitor is visible on the right side of the desk.

CIRStatements Two-factor Login Guide

How to Log In

Our current login process is migrating to Microsoft Azure, a platform that requires two-step, also known as two-factor, verification. This standardized login process uses your email address as a unified login ID, fortifies your data integrity, and enhances your user experience across all our applications and the Wove platform.

Once you create a user profile and provide login credentials, all subsequent logins will use the two-step process across applications and firms. This guide will help you establish the user profile and credentials for the unified login process.

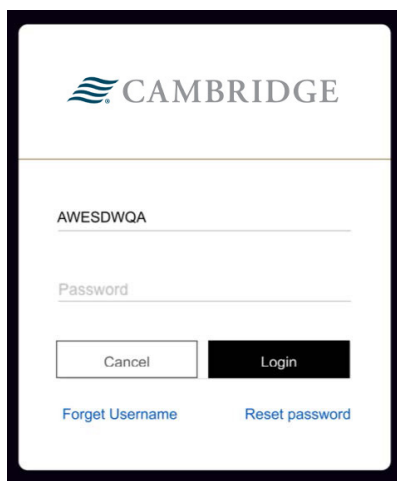
Step 1: For Investors: Navigate to cirstatements.com. It is recommended to clear cache and remove old bookmarks directing to this URL before beginning the process.

For Financial Professionals: Navigate to cir2.com and open the cirstatements application.

When you open the application, you will see the following screen. Enter the login ID used previously to access the Albridge system.

The image shows the Cambridge login interface. At the top is the Cambridge logo. Below it is a 'Login ID' label and a text input field. Underneath the input field is a checkbox labeled 'Remember my login ID'. A black 'Continue' button is positioned below the checkbox. At the bottom, there is a link that says 'Need help logging in?'.

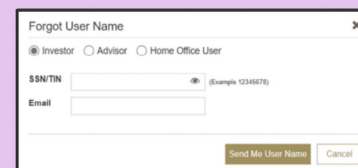
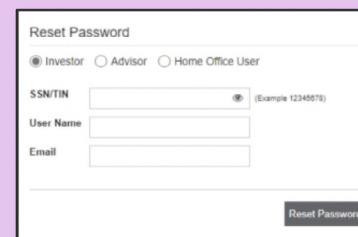
Step 2: Enter your password and click **Login**.

This image shows the next step of the login process. The Cambridge logo is at the top. Below it, there is a text input field containing the placeholder 'AWESDWQA'. Underneath this is a 'Password' label and another text input field. At the bottom, there are two buttons: a 'Cancel' button and a black 'Login' button. Below the buttons are two links: 'Forget Username' and 'Reset password'.

NOTE: If you cannot remember your login ID, just enter what you think it might be, and the system will direct you to the screen in **Step 2**, where you can click on **Forgot Username**.

If you cannot remember your password, click on the blue hyperlink **Reset Password**.

Each hyperlink will bring you to the appropriate screen. See below.

The image shows the 'Forgot User Name' screen. It has a title bar with a close button. Below the title are three radio buttons: 'Investor' (selected), 'Advisor', and 'Home Office User'. There are two input fields: 'SSN/TIN' with a placeholder '(Example 12345678)' and 'Email'. At the bottom right are two buttons: 'Send Me User Name' and 'Cancel'.The image shows the 'Reset Password' screen. It has a title bar with a close button. Below the title are three radio buttons: 'Investor' (selected), 'Advisor', and 'Home Office User'. There are three input fields: 'SSN/TIN' with a placeholder '(Example 12345678)', 'User Name', and 'Email'. At the bottom right is a 'Reset Password' button.

Fill out the necessary information and then click on **Send Me User Name** or **Reset Password**, depending on your need.

Upon completion, you will be redirected to the log-in page shown in **Step 1**.

NOTE: If you cannot remember your login ID, just enter what you think it might be, and the system will direct you to the screen in Step 2, where you can click **Forgot Username**. If you cannot remember your password, click **Reset Password**.

Each hyperlink will bring you to the appropriate screen, where you can fill out the necessary information and then click **Send Me Username** or **Reset Password**, depending on your need. Upon completion, you will be redirected to the log-in page shown in Step 1.

Step 3: Once you have logged in, the system will redirect you to a screen to set up your new username and password. **Your email will be your new username.**

Choose a password of 8-16 characters. Make sure that it includes at least three of the following:

- Uppercase letter
- Lowercase letter
- Number (0 -9)
- Special character, such as @, #, \$, etc.

Set up 2-Step Verification

Let's keep your information secure. The phone number and email address you enter here will be used for all subsequent logins and 2-step verification.

1 Verification code will be sent to the email you have listed

Name*

Suffix / Designation*

Email* (This will be your new login ID)

Mobile Phone

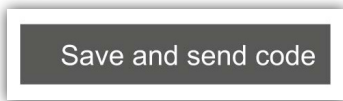
New password*

Confirm new password*

Password requirements:

- 8-16 characters
- Include at least three of the following:
 - A uppercase letter
 - A lowercase letter
 - A number (0-9)
 - A special character @ # \$ etc.

Step 4: Click **Save and send code** at the bottom left of the page.



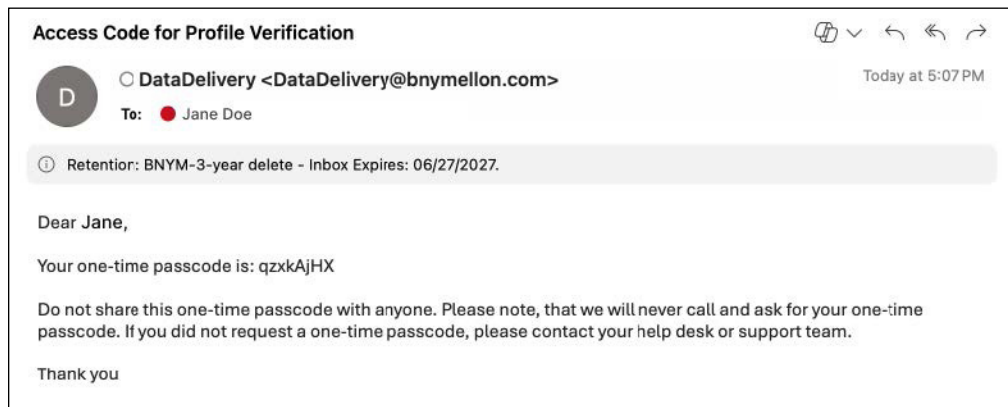
Step 5: The system will notify you that a verification email has been sent to the email account you listed in the previous page.

Email Verification Code Sent

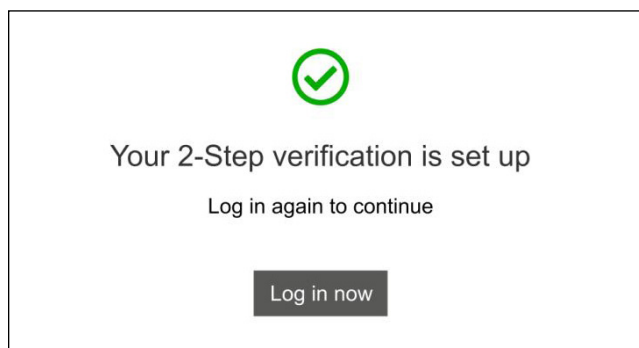
Check your email and enter your verification code. Code sent to Jane.Doe@Company.org

Verification code [Resend code](#)

Step 6: Check your email for a one-time passcode. Then enter the code in the box outlined in red in the figure above. Click **Continue**.



Step 7: A screen noting that your two-step verification has been set up will prompt you to log in again. Click **Log in now**.

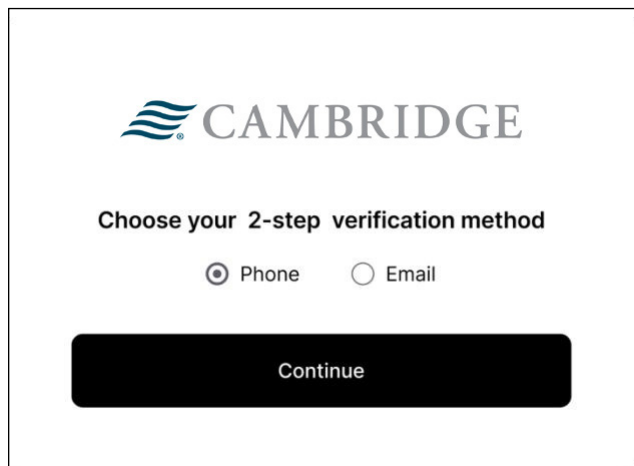


Step 8: When you reach this screen, the URL at the top of the page should now begin with login.woveplatform.com. Enter your password and your login ID, which is your email, and then click **Log in**.



NOTE: Should there be an error, the system will show a message asking you to try setting up two-step verification again. Just click **Try again**, and you will be redirected to the login page, where you can begin setting up your two-set authentication.

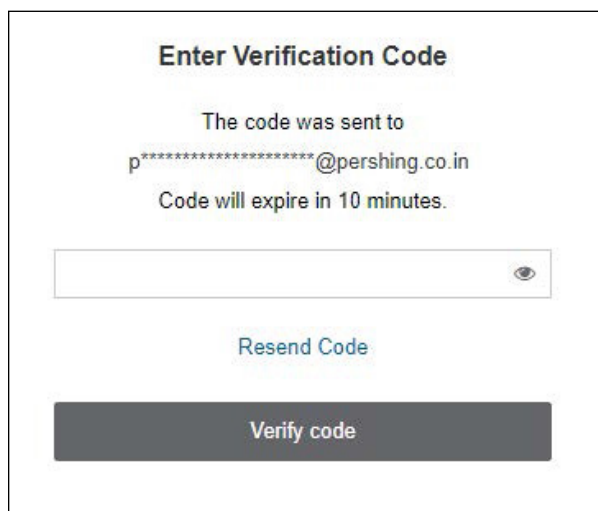
Step 9: The system will ask whether to send the verification code to your email or via a text. Choose an option and then click **Continue**.



The screenshot shows the Cambridge logo at the top. Below it, the text "Choose your 2-step verification method" is displayed. There are two radio button options: "Phone" (which is selected) and "Email". At the bottom, there is a large black button labeled "Continue".

Step 10: Check your email or text messages for the verification code.

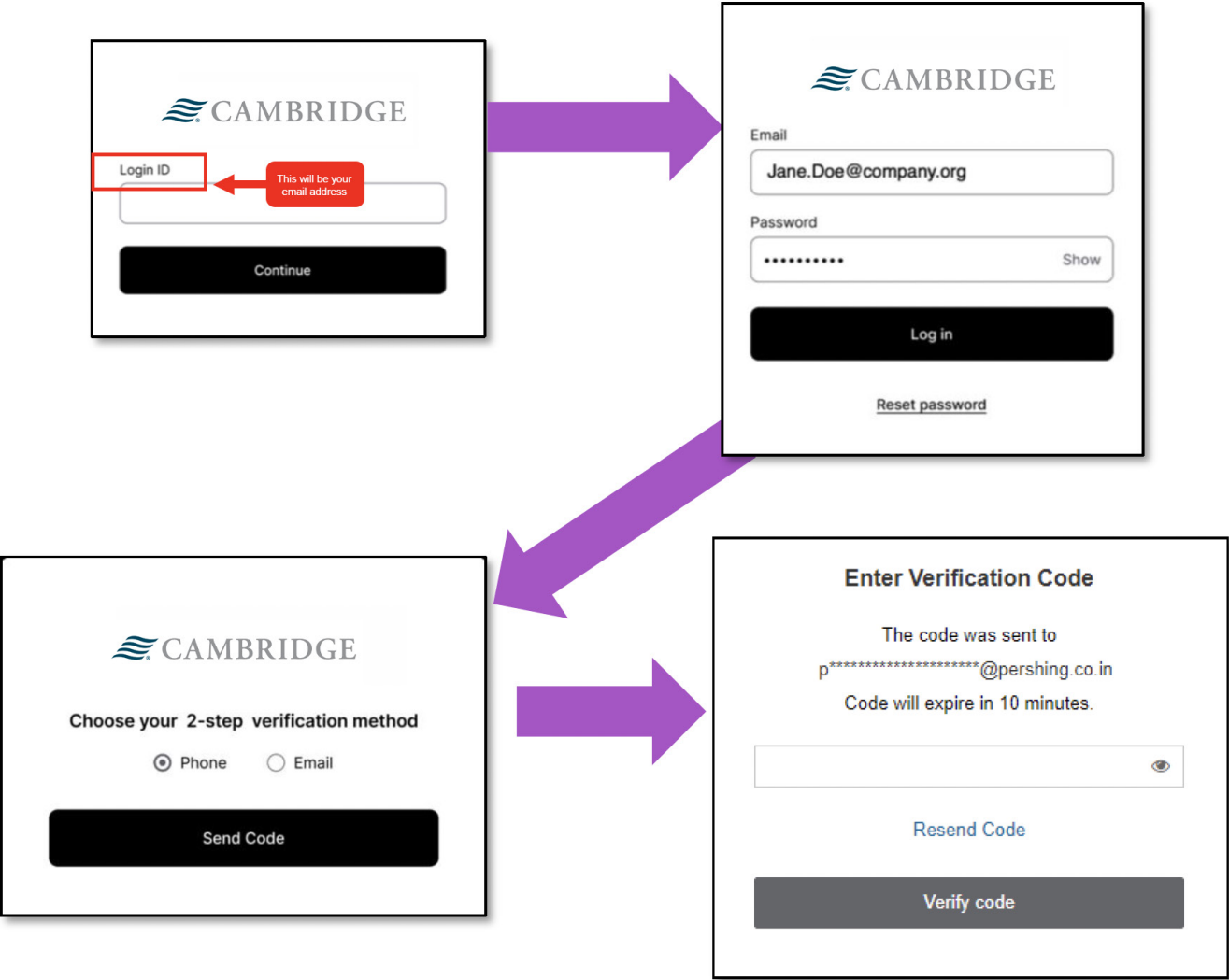
Step 11: Enter the verification code in the spaces provided and click **Verify Code**. If you cannot find the code, click **Resend code** and retry.



The screenshot shows the "Enter Verification Code" screen. It displays the text "The code was sent to" followed by a masked email address "p*****@pershing.co.in". Below this, it says "Code will expire in 10 minutes." There is a text input field for the code, a "Resend Code" link, and a large grey button labeled "Verify code".

Step 12: You will land on your home page from which you can navigate through the Wove Reporting application.

NOTE: After you have set up multi-factor authentication, each time you open the application, the following flow will be how you log in.



APPENDIX: Resetting Your Password

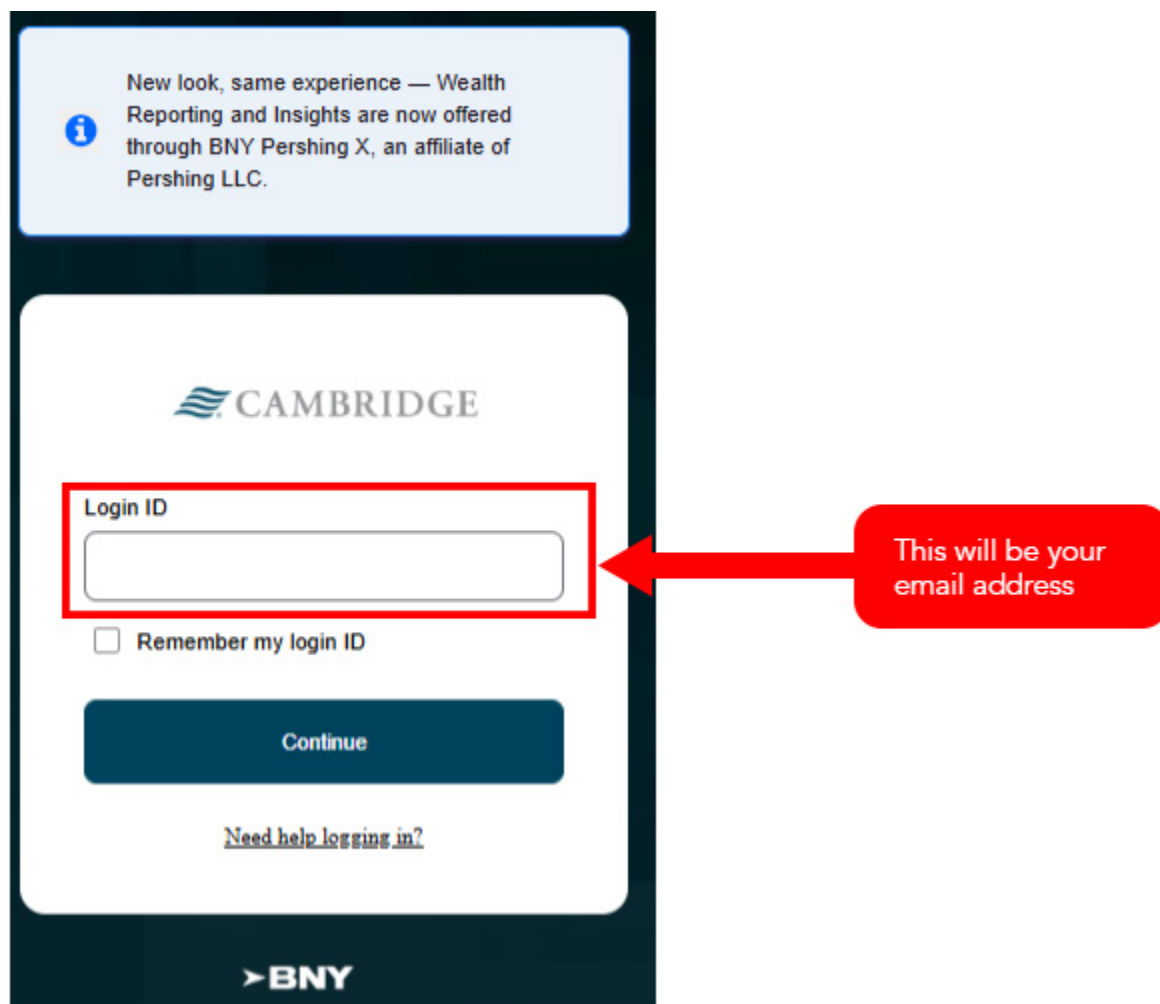
Once two-factor authentication has been set up in CIRStatements, users can now reset their own passwords easily and securely. If you have forgotten your password, or if your account appears to be locked, follow the steps below to complete the password reset process.

Step 1:

For investors: Navigate to www.cirstatements.com.

For financial professionals: Navigate to cir2.com and open the CIRStatements application.

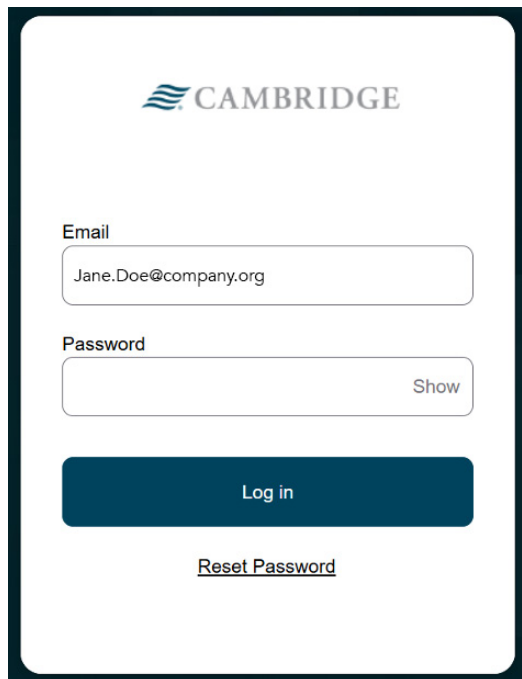
Once there, you will see the login screen below. Enter your email address and click Continue.



The screenshot shows the Cambridge BNY login interface. At the top, a light blue banner contains an information icon and the text: "New look, same experience — Wealth Reporting and Insights are now offered through BNY Pershing X, an affiliate of Pershing LLC." Below this is the Cambridge logo. The main login area is white and contains a "Login ID" label above a text input field. This input field is highlighted with a red rectangular border. A red arrow points from a red rounded rectangle containing the text "This will be your email address" to the input field. Below the input field is a checkbox labeled "Remember my login ID". A dark blue "Continue" button is positioned below the checkbox. At the bottom of the login area is a link that says "Need help logging in?". The BNY logo is at the very bottom of the screen.

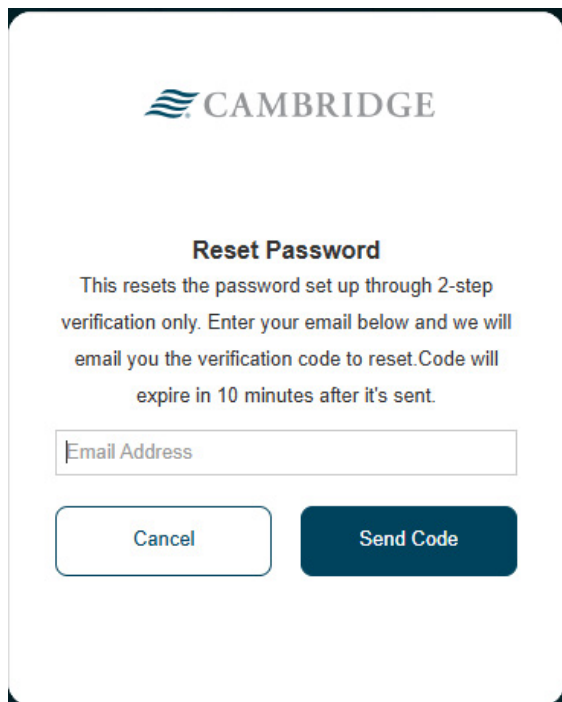
Step 2:

On the next screen, select Reset Password below the Login button.

A screenshot of the Cambridge login interface. At the top is the Cambridge logo. Below it is an 'Email' input field containing 'Jane.Doe@company.org'. Underneath is a 'Password' input field with a 'Show' button to its right. A dark blue 'Log in' button is positioned below the password field. At the bottom, there is a link labeled 'Reset Password'.

Step 3:

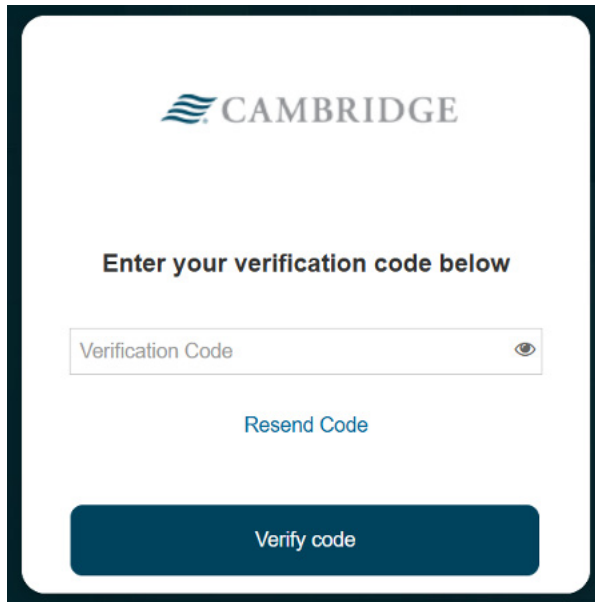
From the Reset Password screen, provide the email address associated with your account in the provided field, and click Send Code.

A screenshot of the Cambridge 'Reset Password' screen. The Cambridge logo is at the top. The title 'Reset Password' is centered. Below the title is a paragraph: 'This resets the password set up through 2-step verification only. Enter your email below and we will email you the verification code to reset. Code will expire in 10 minutes after it's sent.' Below this text is an 'Email Address' input field. At the bottom are two buttons: a light blue 'Cancel' button and a dark blue 'Send Code' button.

Step 4:

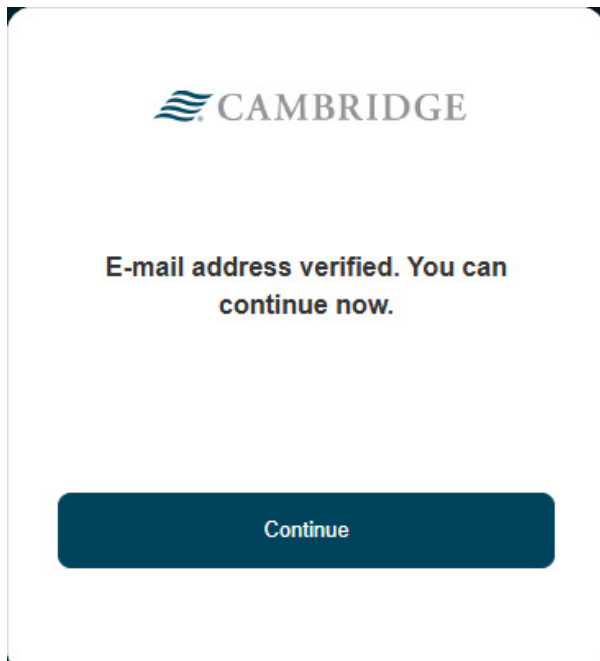
Check your email for the verification code. Enter the verification code in the field provided. Once the code is entered, click the Verify Code button.

If you do not see the email, be sure to check your spam or junk folder. If you do not receive the code, click the Resend Code link.

A screenshot of a web interface for Cambridge. At the top is the Cambridge logo, which consists of a stylized blue wave icon followed by the word "CAMBRIDGE" in a serif font. Below the logo, the text "Enter your verification code below" is centered. Underneath this text is a text input field with the placeholder text "Verification Code" and a small eye icon on the right side. Below the input field is a blue link that says "Resend Code". At the bottom of the form is a large, dark blue button with the text "Verify code" in white.

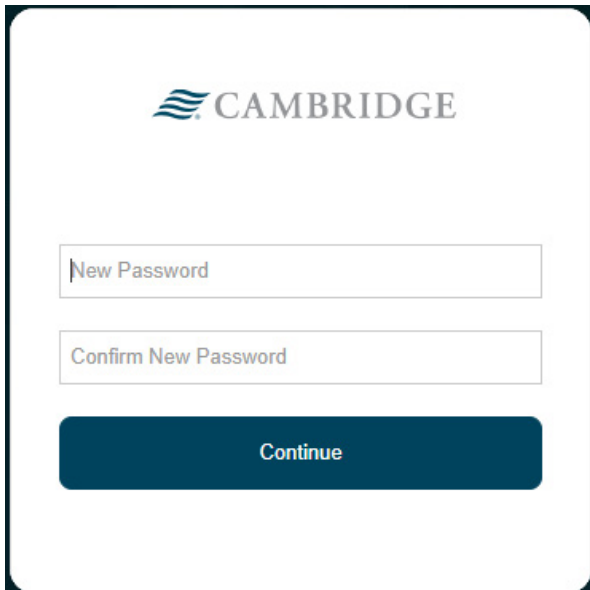
Step 5:

Once the correct verification code has been entered, you will see a screen confirming your email has been verified. Click the Continue button.

A screenshot of a web interface for Cambridge. At the top is the Cambridge logo, which consists of a stylized blue wave icon followed by the word "CAMBRIDGE" in a serif font. Below the logo, the text "E-mail address verified. You can continue now." is centered. At the bottom of the form is a large, dark blue button with the text "Continue" in white.

Step 6:

On the next screen, you will be prompted to enter a new password in the top field, and confirm the new password in the field below. Once both fields have been entered, click Continue.



CAMBRIDGE

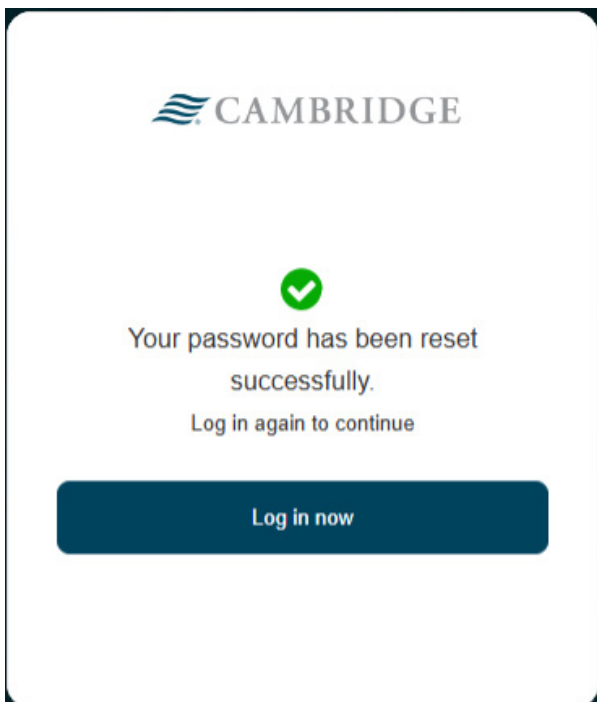
New Password

Confirm New Password

Continue

Step 7:

Once your password has been successfully reset, you will see confirmation on the next screen. Click the Log in now button to log in.



CAMBRIDGE

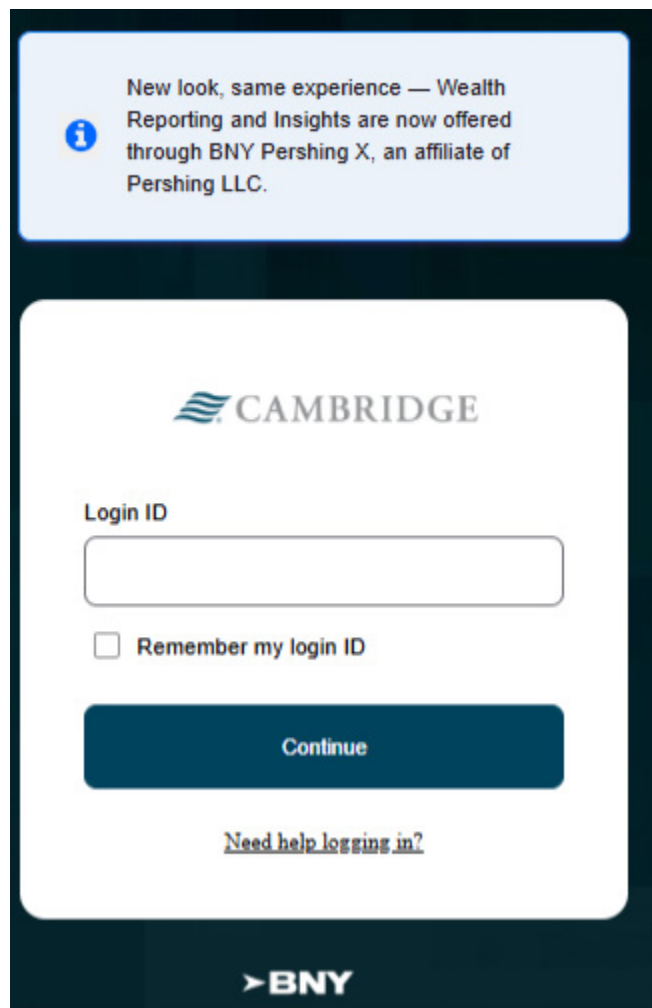
✓

Your password has been reset
successfully.
Log in again to continue

Log in now

Step 8:

Once redirected to the main login page, enter your email address as your Login ID and click Continue. On the next screen, enter your new password.



1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080

Securities offered through Cambridge Investment Research, Inc., a broker-dealer, member FINRA/SIPC, and investment advisory services offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Adviser. Both are wholly-owned subsidiaries of Cambridge Investment Group, Inc.

Trademark(s) belong to their respective owners. This material is for general information purposes only and is not intended to provide legal, tax, accounting, investment, financial or other professional advice on any matter. V.CIR.0525-1856