

## WEALTHSCAPE INVESTOR REGISTRATION GUIDE

Below are instructions an investor with brokerage accounts held with Fidelity Institutional® should follow to register and set up online access, as well as manage electronic delivery preferences.

Who can register on Wealhscape Investor<sup>SM</sup>? If there is a natural person as an account holder with the following information on file:

- Full name
- Date of birth (DOB)
- Social Security Number (SSN)/Taxpayer Identification Number (TIN)

Examples of eligible registration types:

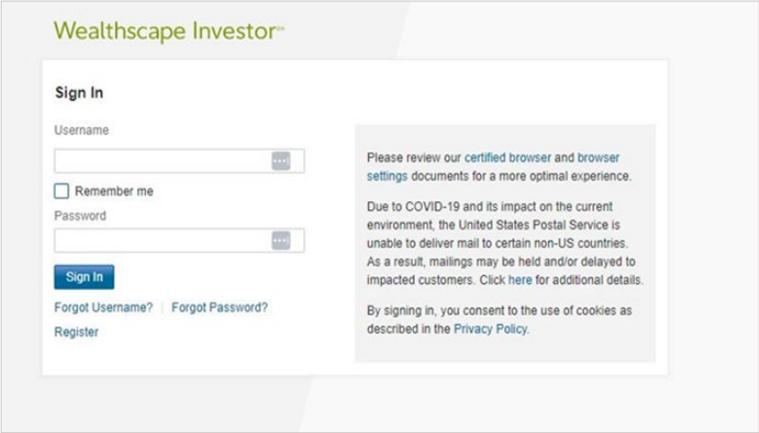
- I/TODI – Individual/Individual Transfer on Death
- J/JTOD – Joint/Joint with Rights of Survivorship Transfer of Death
- IRA – Traditional IRA
- Roth – Roth IRA
- IRRL – Rollover IRA

Examples of ineligible registration types:

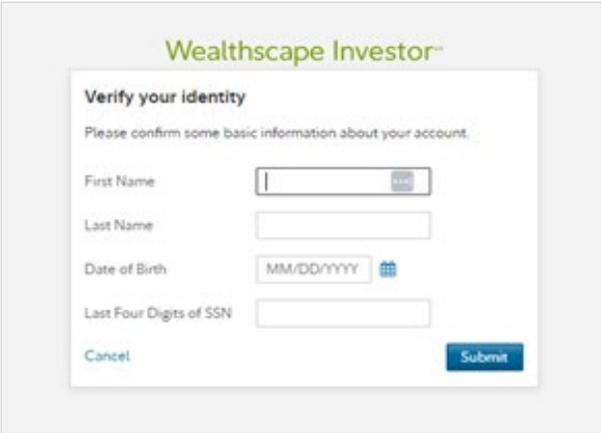
- TRUA – Trust Under Agreement
- TRUW – Trust Under Will
- CP – Corporation
- SMPL – Simple IRA
- KPS – Profit Sharing Keogh

For a full list of eligible and ineligible registration types or assistance with registering, please contact your financial professional.

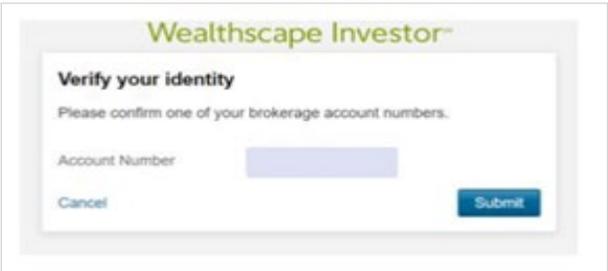
1. Visit [www.wealthscapeinvestor.com](http://www.wealthscapeinvestor.com) and select **Register**.



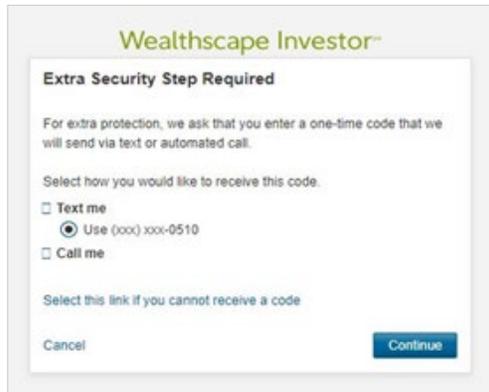
2. Complete all fields under Verify your identity and select **Submit**.



3. Enter the nine-character Fidelity Institutional® brokerage account number and select **Submit**.  
Note: This will only be asked for investors that have accounts with Fidelity Institutional® at multiple broker-dealers.



4. Select **Text me** or **Call me > Continue**. The options are the daytime/evening phone number(s) associated with the brokerage account. Note: If a phone number is not associated with the account, the investor will not be able to register and must contact their financial professional to have the phone number on the account updated.



The screenshot shows a mobile application interface for 'Wealthscape Investor'. The title is 'Extra Security Step Required'. Below the title, it says 'For extra protection, we ask that you enter a one-time code that we will send via text or automated call.' There are two radio button options: 'Text me' (which is selected) and 'Use (xxx) xxx-0510'. Below that is a 'Call me' option. At the bottom, there is a 'Continue' button and a 'Cancel' link.

5. Enter the Security Code that was received and select **Submit**.



The screenshot shows a mobile application interface for 'Wealthscape Investor'. The title is 'We sent you a text message'. Below the title, it says 'Look for the security code we just sent you to (xxx) xxx-0510 and enter it below.' There is a text input field labeled 'Security Code'. Below the input field, it says 'Code expires in 30 minutes.' and 'Didn't get the code? Request another one.' At the bottom, there is a 'Submit' button and a 'Cancel' link.

6. Create a Username and Password by completing the required fields. Select **Submit**.  
Note: Refer to guidelines when creating a username and password.



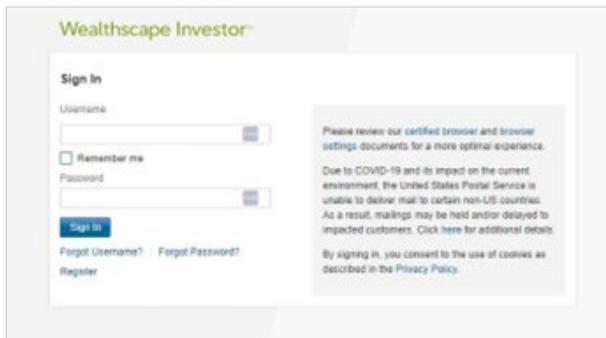
The screenshot shows the 'Wealthscape Investor' registration page. The main heading is 'Create Login Information'. Below it, a note states 'All fields are required unless otherwise noted.' The form is divided into two sections: 'Create a Username' and 'Create a Password'. In the 'Create a Username' section, there is a text input field for 'New Username (optional)'. Below it are three red error messages: 'Use 9 to 15 letters and/or numbers', 'At least one letter', and 'No symbols, punctuation marks, or spaces (e.g. #@\*~.-)'. A link 'See more guidelines' is provided. In the 'Create a Password' section, there is a text input field for 'Create a new password'. Below it, the password strength is indicated as 'Weak' with a red 'X' icon. A note says 'Letters are case-sensitive'. There are three red error messages: '6 - 20 characters', 'Upper and lower case letters', and 'At least one number'. A note specifies 'Special characters except for #&\*~<->[]'. Below the password field is a 'Confirm your password' text input field. At the bottom left is a 'Cancel' button and at the bottom right is a blue 'Submit' button.

7. The following confirmation screen will appear once completed. The default Investor ID is only needed if a custom username was not created in the last step. To log into Wealthscape Investor, select **Return to Login Page**.



The screenshot shows the 'Wealthscape Investor' registration confirmation screen. The main heading is 'Registration Successful'. Below it, a note states 'Use your Username when logging in. Make a note of your Investor ID for future reference.' The screen displays two pieces of information: 'Username' with the value 'Oliver143' and a 'Copy' button, and 'Investor ID' with the value '6906319500' and a 'Copy' button. At the bottom right, there is a blue button labeled 'Return to Login Page'.

8. Enter the Username and Password, then select **Sign In**.



The image shows the 'Sign In' page for Wealthscape Investor. It features a 'Sign In' heading, a 'Username' input field with a 'Show/Hide' button, a 'Remember me' checkbox, a 'Password' input field with a 'Show/Hide' button, and a blue 'Sign In' button. Below the button are links for 'Forgot Username?' and 'Forgot Password? Register'. To the right, there is a notice about browser settings and a COVID-19 related disclaimer, followed by a consent statement: 'By signing in, you consent to the use of cookies as described in the Privacy Policy.'

9. Read through the User Agreement. Check I have read and accept the terms and select **Next**.



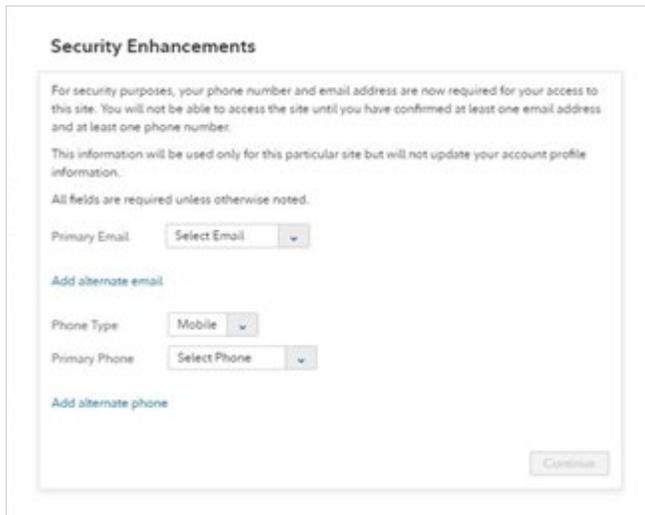
The image shows the 'Terms of Use' page for Wealthscape Investor, featuring the Cambridge logo. It displays a 'User Agreement' document in a scrollable window. Below the document, there is a checkbox labeled 'I have read and accept the terms', along with 'Cancel' and 'Next' buttons.

10. Set up security contact information.

To enhance and strengthen platform security, Wealthscape Investor utilizes 2-factor authentication (2FA) using a phone number to deliver one-time PINs to confirm an investor's identity. Upon successful sign in to Wealthscape Investor, investors must provide secure contact information by entering a valid email address and valid phone number.

- Email addresses entered for security contact information do not replace email addresses already on file for an account, such as the email used for electronic delivery
- Valid phone numbers include domestic U.S. and international numbers
- After entering at least one email address and phone number, you will not be prompted for this information again

11. Select **Primary Email** and **Phone**, then select **Continue**.



**Security Enhancements**

For security purposes, your phone number and email address are now required for your access to this site. You will not be able to access the site until you have confirmed at least one email address and at least one phone number.

This information will be used only for this particular site but will not update your account profile information.

All fields are required unless otherwise noted.

Primary Email:

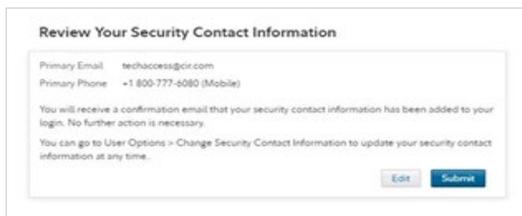
Add alternate email

Phone Type:

Primary Phone:

Add alternate phone

12. Review the information and select **Submit** if everything appears correct, or select **Edit** if changes are needed.



**Review Your Security Contact Information**

Primary Email: techaccess@cir.com  
Primary Phone: +1 800-777-6080 (Mobile)

You will receive a confirmation email that your security contact information has been added to your login. No further action is necessary.

You can go to User Options > Change Security Contact Information to update your security contact information at any time.

13. Upon logging into Wealthscape Investor, a mandatory 2FA screen will appear. Select **Continue** to acknowledge the 2FA process will occur on next login.



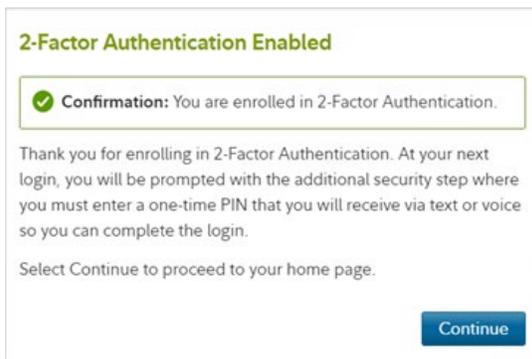
**2-Factor Authentication Enrollment**

**Note:** You must enroll in 2-Factor Authentication to continue.

In order to enhance security, you are required to enroll in 2-Factor Authentication. Please select continue to complete the one-time enrollment process.

For additional security, you may be asked to enter a one-time PIN using the phone number as a security contact.

14. The following confirmation will appear. Select **Continue**.



15. Select **Enroll Now** to opt into electronic delivery.



16. Choose the documents to set up for electronic deliver per account and select **Save This Account.**

The screenshot shows a web browser window titled "Document Delivery Instructions - Google Chrome". The URL is "mystreetscape.com/acc/accounts/profilesummary/my/access/enotification/e/Notification.do". The page title is "Document Delivery Instructions" with a note that an asterisk indicates a required field. Below the title, there is a message: "Rather than sending paper-based mail, we will send you an email alert when your financial documents are available to view online." and a link "Enroll All Accounts". A section titled "Select and save each account separately" contains a dropdown menu with one entry: "Individual (I) - SIC [redacted] Not Enrolled". Below this is an "Email Address" field with the text "No email address on file" and a link "Add Email". A table of "Document Delivery Instructions" follows, with columns for document type, "Electronic Delivery" (radio button), and "U.S. Mail" (radio button). The table lists: "Confirms/Confirming Prospectuses", "Statements & Regulatory Inserts", "Eligible Customer Correspondence", "Shareholder Reports (including Prospectus) & Other Documents", and "Tax Forms & Related Disclosures". For each row, the "U.S. Mail" option is selected. At the bottom, there is a note: "Selecting either option above will still allow you to access your documents online." and two buttons: "Close" and "Save This Account".



For questions, contact your financial professional.

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