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CENTERED  
WEALTH

Wealthscape Investor<sup>SM</sup>

## Online Access to your Centered Wealth Account(s)

**Did you know that you have online access to your accounts  
with Centered Wealth?**

The majority of our accounts are held at National Financial Services.  
[Wealthscape Investor](#) is the online portal for National Financial  
Services.

Grab a copy of your account statement and follow the instructions  
below to register for your account and sign up for electronic  
document delivery.

***Scroll to the end of this email for important tips & tricks!***

Questions?

Simply reply to this newsletter!

Or, email [info@centered-wealth.com](mailto:info@centered-wealth.com).

# Wealthscape Investor<sup>SM</sup> User ID Registration

**investor.wealthscape.com**

On the login window, click **Register**.



When the first Register Now window opens, enter the last four digits of your Social Security number (SSN), your first and last name, and your date of birth by selecting month, day, and year from the drop-down lists. Click **Next**.

Provide an account number for the site you want to access. Click **Next**.

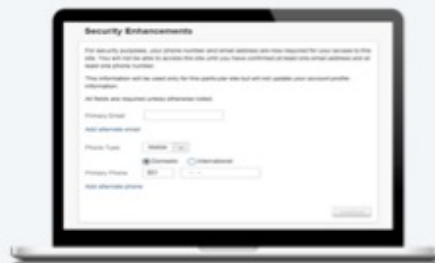


Create an alphanumeric password and security question and answer (SQA). You will be prompted to answer additional security questions. You may bypass during your initial visit, but will be required to complete the next time you login. Click **Next**.



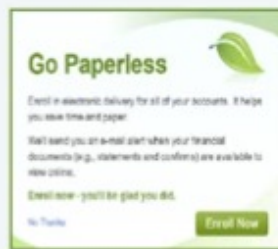
You will receive confirmation that your registration was successful, along with your User ID. Please record your User ID for future use. Click **Continue to home page**.

The first time you access the site, you will be required to set up additional security questions and answers, as well as enter your phone number and email address. Enter in your information and click **Continue**, you will then be prompted to review and submit.



You may be prompted to customize your username after you have completed registration. A custom username can be setup to represent your 10-digit user ID when logging into Wealthscape Investor. This is optional. If you do not want to create a custom user name at the time of registration, you may do so at a later time. Refer to onscreen guidelines and follow the prompts to complete setting up your customized user name then click **Close**.

You may be prompted to set your eDelivery preferences. Follow the prompts to do so. You may also update your eDelivery preferences at any time by selecting Document Delivery Instructions via the Service menu.\*



\* Some functionality may not be available to all customers. Screenshots included in this document are provided for illustrative purposes only. Your broker-dealer is an independent company and is not affiliated with National Financial Services LLC. Fidelity Family Office Services is a division of Fidelity Brokerage Services LLC. Fidelity Clearing & Custody Solutions® provides clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC. ©2019 FMR LLC. All rights reserved. 889751.1.0 1.9889930.100

## Important Tips & Tricks

After you've set up your [Wealthscape Investor](#) account on your computer's web browser (Chrome recommended), download the **Wealthscape Investor** app to view your account information on your mobile device:

[iOS Apple - Wealthscape Investor App](#)  
[Google Play - Wealthscape Investor App](#)



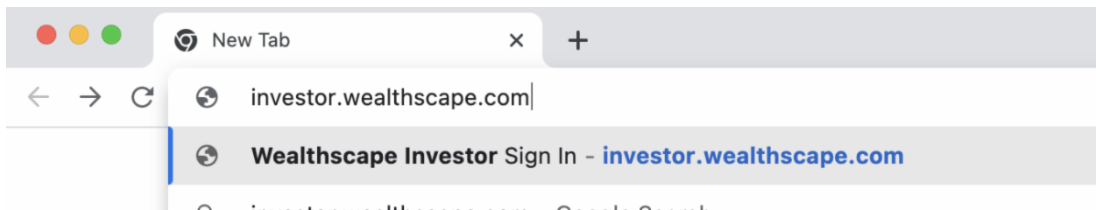
Be sure to download the **Investor** version of Wealthscape!

Look for this icon in the app store!

\*\*\*There are multiple versions of this app and using the wrong one will result in account lock-out.\*\*\*

Here is a [.pdf version](#) of the registration instructions above.

[Here is the full Wealthscape Investor User Guide.](#)



Bookmark the URL:  
[investor.wealthscape.com](https://investor.wealthscape.com)  
for the next time you log on!

Signing up for a Wealthscape Investor account will allow you to suppress hard copy statements and documents and instead receive an email notification when your documents are ready to view.

Please note, that if you have multiple accounts, you'll need to customize the document delivery settings for EACH account. To access these settings, click "Service" in the upper right of your Wealthscape Investor portal.

Remember to click "Save" before clicking on the next account!

We recommend changing all document delivery settings to "Electronic" *except* for your tax documents. Tax documents will still

be available electronically, but you're less likely to miss a tax document if it gets mailed to you.

**BE SURE YOUR EMAIL IS ENTERED CORRECTLY FOR YOUR eDELIVERY NOTIFICATIONS.**

Email notifications for your statements and documents will come from:

VANDERBILT SECURITIES LLC and/or  
VANDERBILT ADVISORY SERVICES  
<e-notification@mail.mybrokerageinfo.com>  
(Do Not Reply - Email not monitored.)

**Read each step of the instructions for registration carefully and make sure you write down your Investor ID.**

Make sure you configure your security settings right away. This will help keep your account secure and prevent account lock-out.

After you've completed registration, log out and immediately log back in to make sure you maintain access to your account.

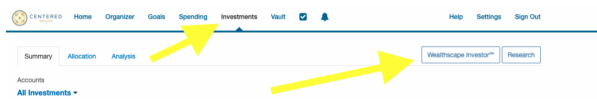


Do you use a password saver like LastPass or Keychain?

Your credentials might get incorrectly saved under "mystreetscape.com" in your password saver and make automatic login difficult. Double check your password saver saves the URL for your login as investor.wealthscape.com.

Do you use the [Centered Wealth Financial Planning Portal](#)?

After you've registered for your Wealthscape Investor account, you can have single sign-on (SSO) access to Wealthscape Investor through your planning portal:



Log in to your planning portal, click the investments tab and then click the Wealthscape Investor button.

You'll also have access to your statements and documents in your Vault, under the "Brokerage Account Documents" cloud folder.