

Enroll for Access Online

If you would like to have online or mobile access to your Advantage Program, IRA, or Investment (Brokerage) account:

1. Select the "Sign Up" link from your firm's Access Online login screen.
2. Enter your account information and answer a few personal questions to verify your identity.
3. Once verified, enter the account numbers you would like to view online.
4. Create a User ID and Password to access your accounts.
5. Upon your initial login, you will be presented with an Online Agreement which will need to be reviewed and accepted only once.
6. To complete your online enrollment, create three security questions and answers for future password resets.

User ID

 Password

[Sign Up](#) **1**
[Forgot Password](#)
[Forgot User ID?](#)

Enter Information Verification Accounts Create User ID
 1 2 3 4

Online Enrollment

Enter Information

Please enter the following information to create your account. All fields are required.

2
 First Name

For enrollment assistance, please contact Access Online Support at **1-877-488-3748**, 24 hours a day, 7 days a week.

Accounts & Services Markets Quotes & Research Education Customer Service
 Summary Balances Activity Portfolio Performance Statements & Docs BillPay Account Services

Account Summary

Quote:

View

Account Summary

Securities priced as of Previous Market Close

[Nickname your Accounts](#) [Group Accounts](#)

Account Name ▲	Account Number	Account Type	Securities Market Value	Cash & Cash Alt.	Margin Balance	Account Value	Change from Previous (%)
Brokerage	*1234	Margin	\$176,506.20	\$7,020.64	\$0.00	\$183,526.84	0.00
IRA	*4321	Cash	\$304,568.28	\$1,438.62	\$0.00	\$306,006.90	0.00
Household Total			\$481,074.48	\$8,459.26	\$0.00	\$489,533.74	0.00

On track to meet your goals?

Electronic Delivery of Account Documents

With Access Online, you can securely access up to seven years of account documents, such as Statements, Trade Confirmations and Tax Documents/1099s, as soon as they are created – before they reach your mailbox.

Go paperless and choose electronic delivery of account documents and shareholder communications:

1. Log in to Access Online and select the **Statements & Docs** tab.
2. Click 'Delivery Preferences' in the Quick Links box.
3. Choose 'Electronic Delivery' of all account documents, or check the boxes for the account documents you wish to have delivered electronically.
4. Select an email address to which a notification can be sent when a document is available to view online.
5. If you have chosen electronic delivery of Shareholder Communications, create a 4 digit PIN to use when voting your proxy shares online.
6. Click the Save button and review the **Disclosure Statement Regarding Electronic Delivery of Documents**. By accepting the disclosure statement, you will turn off paper delivery of your selected documents sent through the mail.

To view your account documents online, select **Statements & Docs** under the **Accounts & Services** tab.

Brokerage accounts carried by First Clearing, LLC, Member FINRA/SIPC. First Clearing, LLC is a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

1. Choose Your Delivery Preference

Electronic Delivery [Details](#)

Mixed Delivery [Details](#)
(Use check boxes below)

Paper Delivery [Details](#)

2. Review or Customize

Check the boxes below to receive only electronic delivery of those documents. [More info](#)

Account Name	Account Number	Statements	Trade Confirmations	Performance Reports	Tax Docs/1099s	Other Documents	Shareholder Communications
		<input checked="" type="checkbox"/> Current & Future	<input checked="" type="checkbox"/> Current & Future	<input checked="" type="checkbox"/> Current & Future	<input type="checkbox"/> Current & Future	<input checked="" type="checkbox"/> Current & Future	<input type="checkbox"/> Current & Future
My Command	*1234	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
IRA Account	*8596	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other Stuff	*4563	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
UTMA	*9514	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Choose an Email Address and PIN

Choose the Email Address to which Document Notifications Will Be Sent

Email Address for Notifications: [Modify](#) [Add Email Address](#)

PIN Required for Electronic Delivery of Shareholder Communications

Create Shareholder Communications PIN (4 digits): [What's This?](#)

For assistance, contact Access Online Support at **1-877-488-3748**.