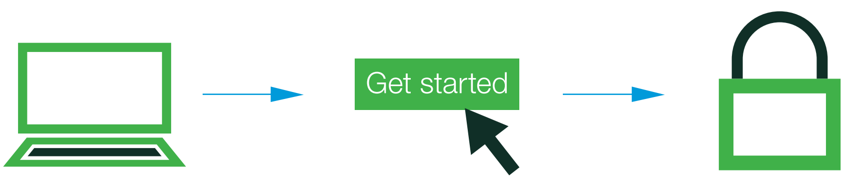
Gain online access

Now that your account is open, you'll want to be able to view and manage your account online

Get instant access to your account in a few simple steps



Step 1:
Visit AdvisorClient.com

Step 2:
Click **"Get Started."** Then enter the User ID your advisor provided to you and your ZIP Code™. If your advisor has not provided you with a User ID, you may enter your Account Number and your ZIP Code. You can create your own User ID once your identity has been validated.

Step 3:
A Security Code will be generated and provided to you via phone or email. Enter the Security Code where indicated.

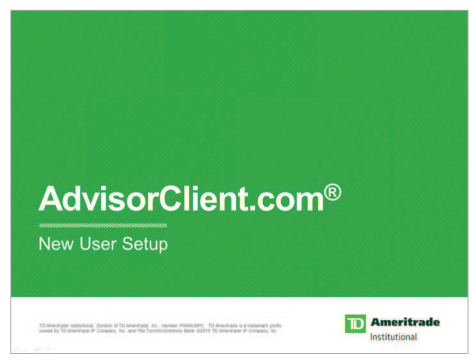
Step 4:
Your accounts will be automatically attached to your user profile. You may remove any of these accounts from appearing in AdvisorClient with a few easy steps:

- Click Client Services from the site menu
- Under My Profile, click UserID Settings
- Find the "Accounts associated with my UserID" section and click the Edit link to the right of that section

Step 5:
Choose your communication preferences

Step 6:
If you would like to have real-time streaming quotes, please visit the UserID Settings page from the Client Services menu, find the Exchange Agreements section, and click the Edit link to the right to sign your Exchange Agreements.

Once you complete this brief setup process, you will be able to view your account balances, positions, transaction history, statements, tax documents, and more.



Watch a video of the AdvisorClient.com New User Setup process