

This resource will help guide you through the login experience. Select the section below and follow the on-screen guidance throughout the guide. You can also select the navigational links at the top of the screen.

Existing user

Select **Go** if you have online access and need to update your profile.

Go

Your Firm's kbps here

Have you updated your profile?

If it's your first time logging in after 9/30/22, you must update your profile before logging in.

Get Started

Account Login [Sign Up](#)

User ID

Password

GO

[Forgot Password?](#) [Forgot User ID](#) [Privacy Policy](#) [Notice of Data Collection](#)

Message Area

Welcome to our website! This site offers real-time account data and downloads. New "Quick" "Please log out" and "Log Out" buttons.

If you have any questions, please call your Financial professional or call Online Support toll free at 1-877-444-4444. Hours: Monday - Friday, 8 am to midnight ET. Saturday - Sunday, 9 am to 6 pm ET. Outside the US, please see Top US link.

Please note that new online IDs can only be established Monday - Saturday, 9 am to 7 pm ET.

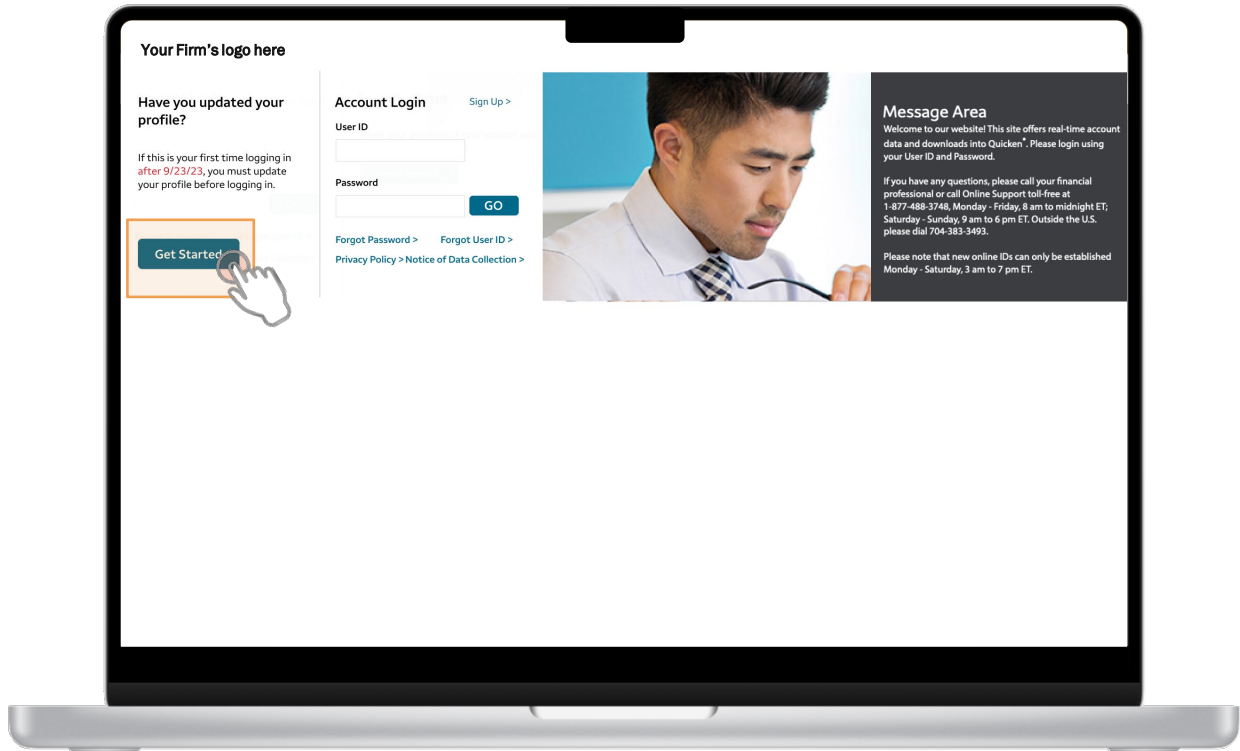
Existing User Login Experience progress bar

Existing User Login Experience

Select **Get Started** when first coming to the page.

Select the highlighted area, **Next**, or you can select **Back** to return to the previous page.

Back Next

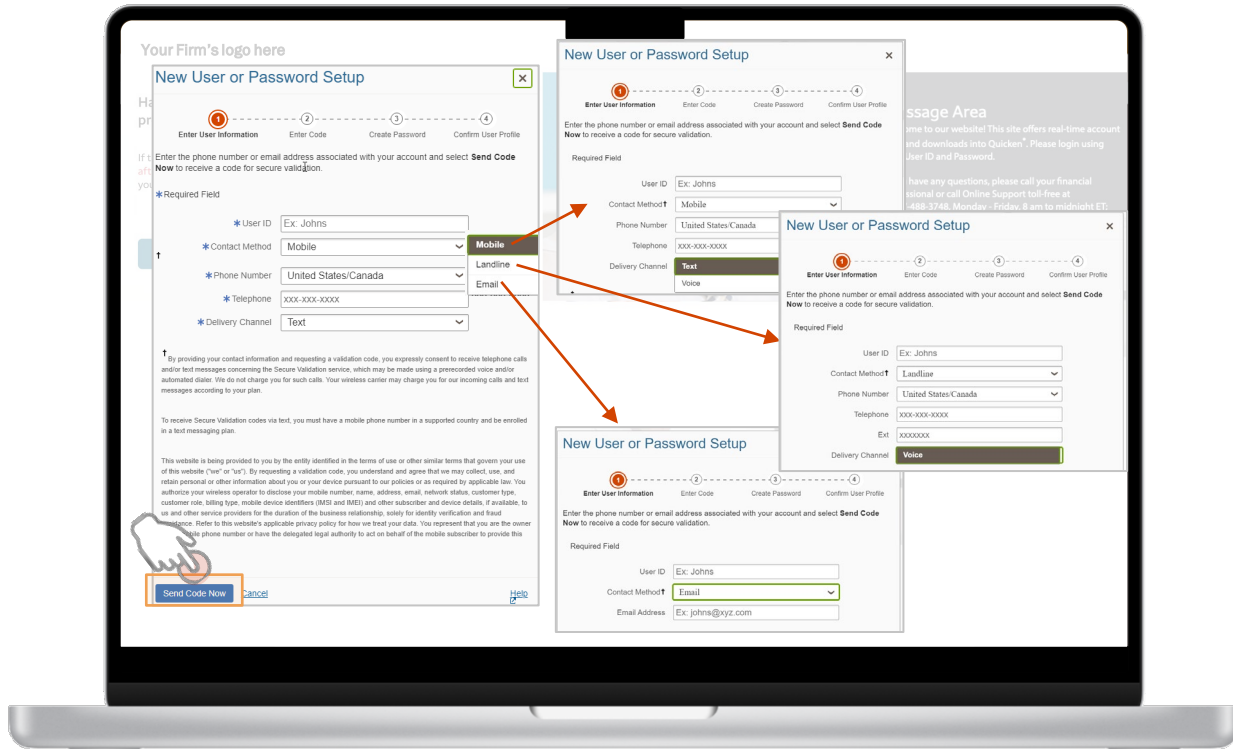


Existing User Login Experience progress bar

Existing User Login Experience

Enter the required fields associated with your account and choose your preferred contact method and delivery channel. Depending on the “Delivery Method” you selected from the dropdown menu, your field options will change. Select **Send Code Now** to receive a code for secure validation.

Select the highlighted area, **Next**, or you can select **Back** to return to the previous page.



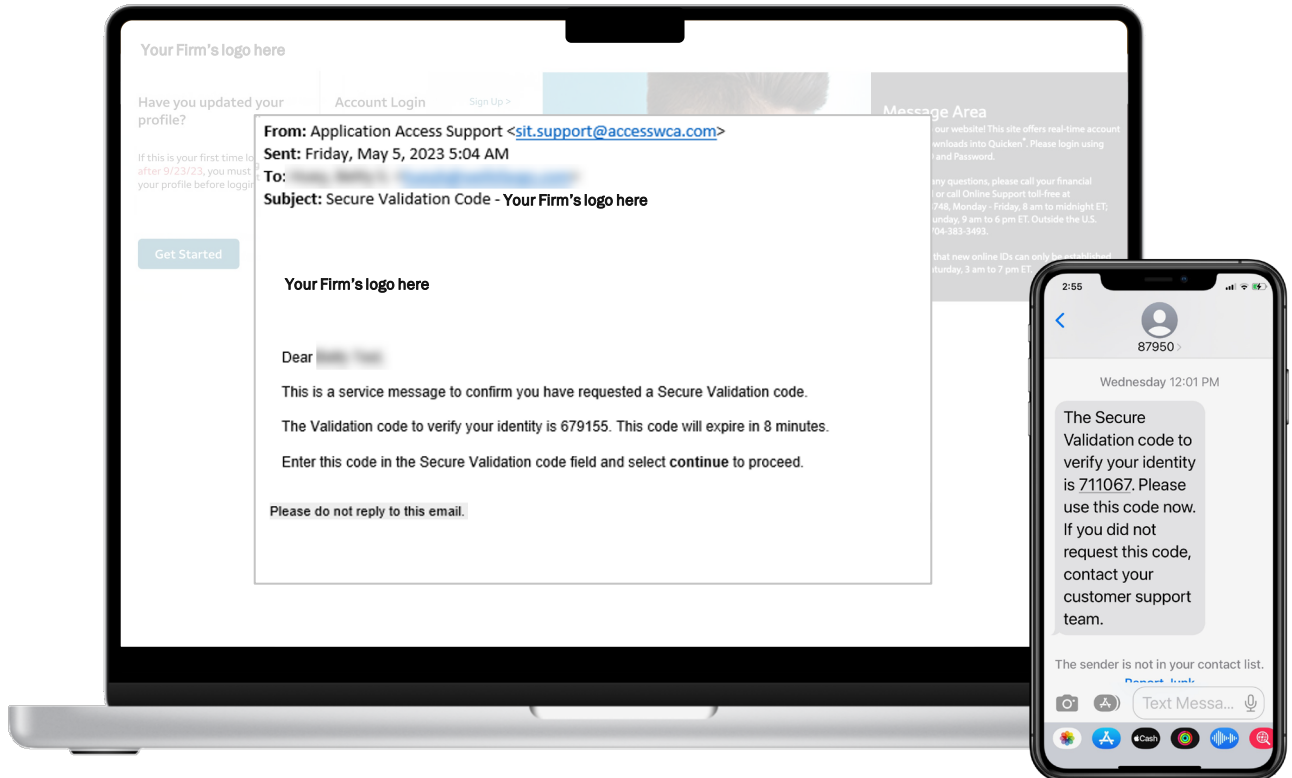
Existing User Login Experience progress bar

Existing User Login Experience

You can select to have your secure validation code sent to you by email or phone. Copy down the code to enter it on the following page.

Select **Next** or you can select **Back** to return to the previous page.

Back Next



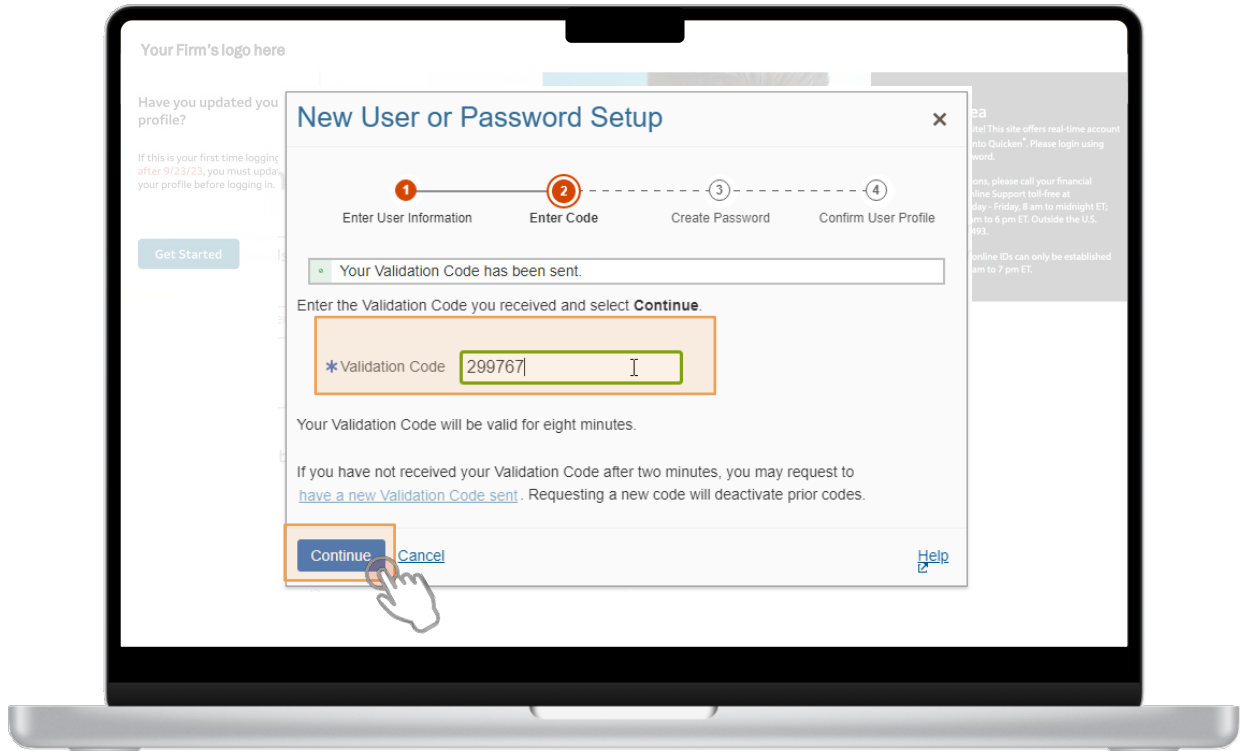
Existing User Login Experience progress bar

Existing User Login Experience

Enter the validation code that was sent to you by phone or email and then press **Continue**.

Select the highlighted area, **Next**, or you can select **Back** to return to the previous page.

Back Next

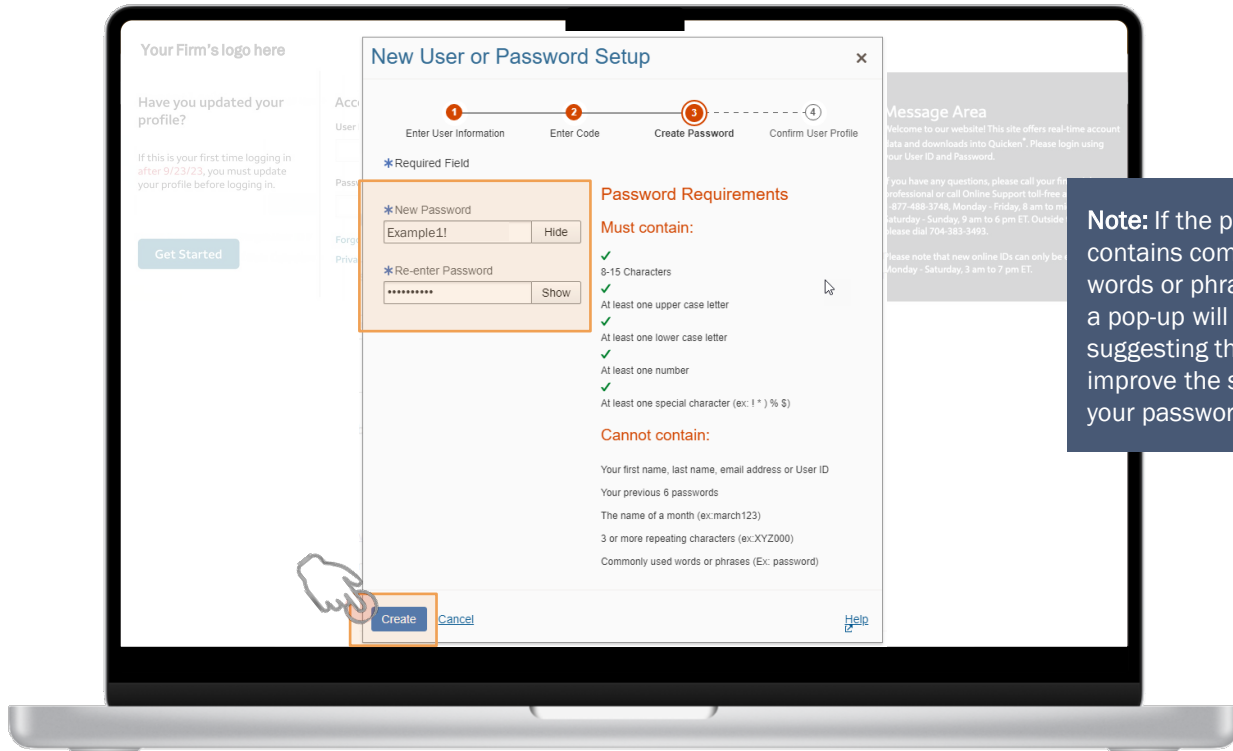


Existing User Login Experience progress bar

Existing User Login Experience

The password fields are dynamic and will help provide real-time guidance as you are entering your password. You can show or hide your password as you type. A green checkmark tells you what requirements have been met and a red “X” tells you what requirements haven’t been met. After creating a new password that meets all the requirements, re-enter the password and press **Create**.

Select the highlighted area, **Next**, or you can select **Back** to return to the previous page.



Note: If the password contains commonly used words or phrases, a pop-up will appear suggesting that you improve the strength of your password.

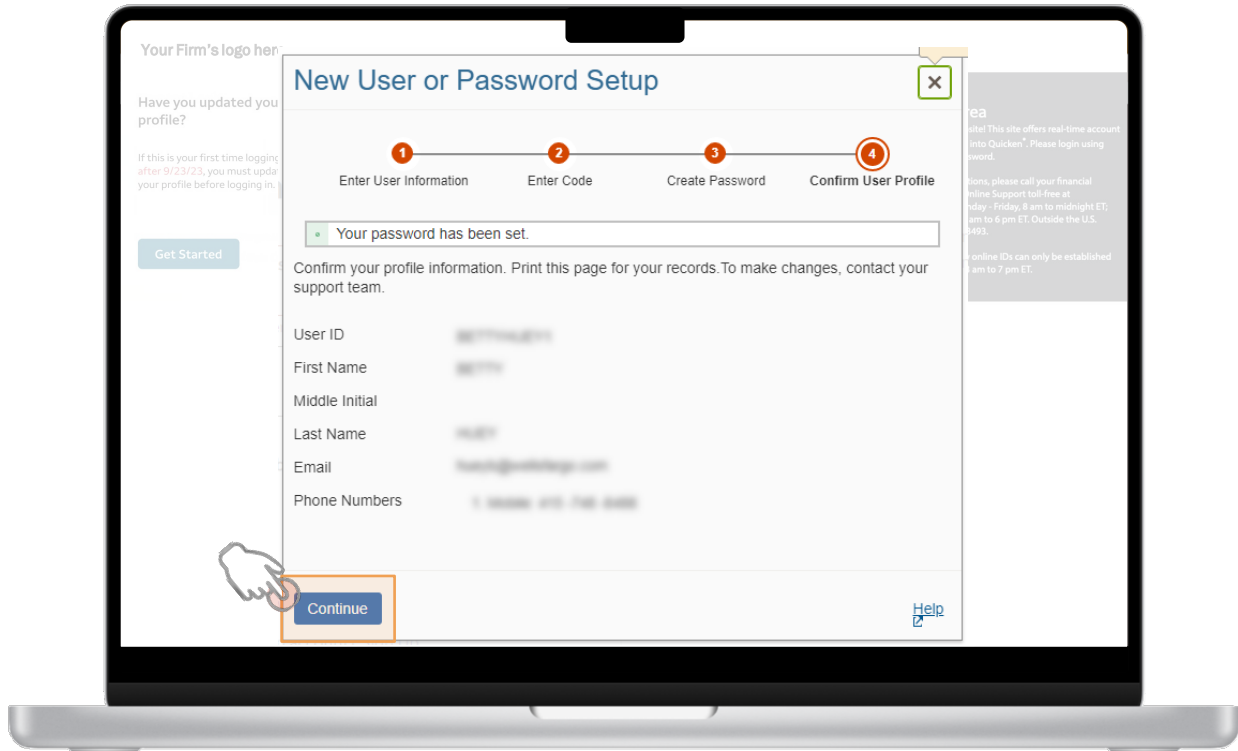
Existing User Login Experience progress bar

Existing User Login Experience

A confirmation that your password has been set should appear. Review the profile information on the screen and press **Continue**.

Select the highlighted area, **Next**, or you can select **Back** to return to the previous page.

Back Next



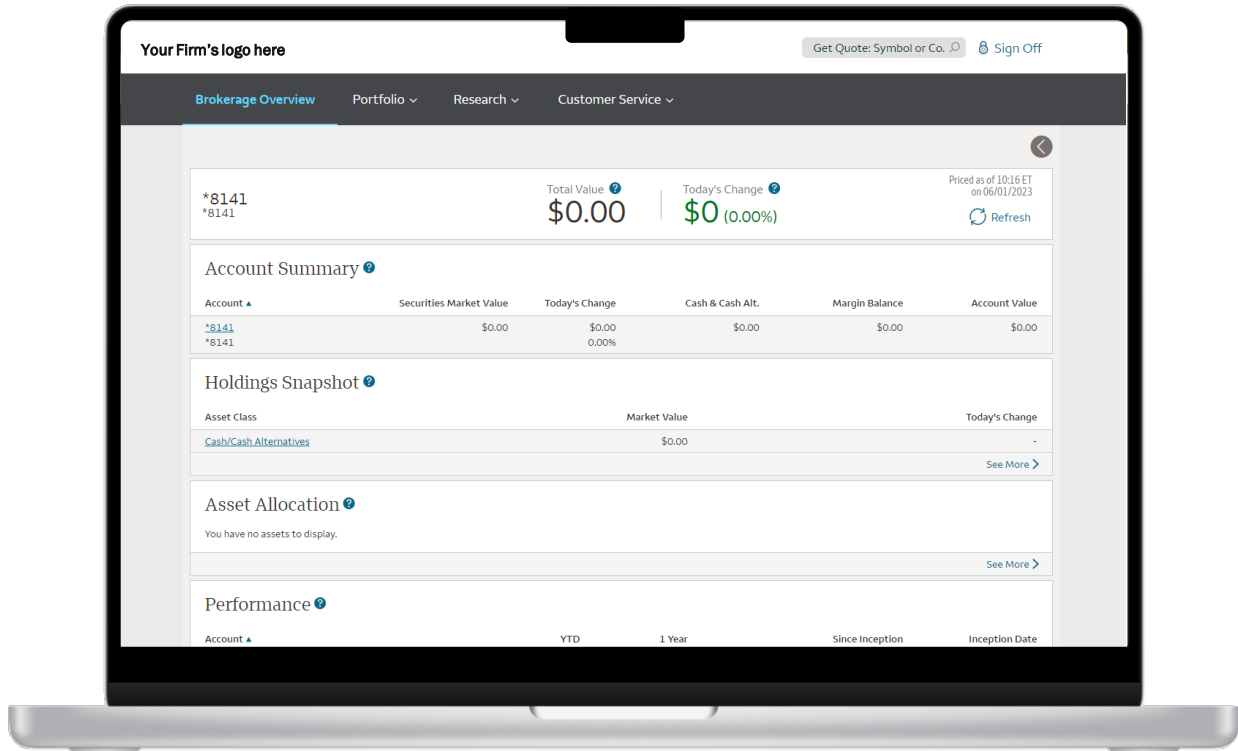
Existing User Login Experience progress bar

Existing User Login Experience

After you've created your user profile and password, you will be directed to your Brokerage Overview page without having to login again.

Select **Next** or you can select **Back** to return to the previous page.

Back Next



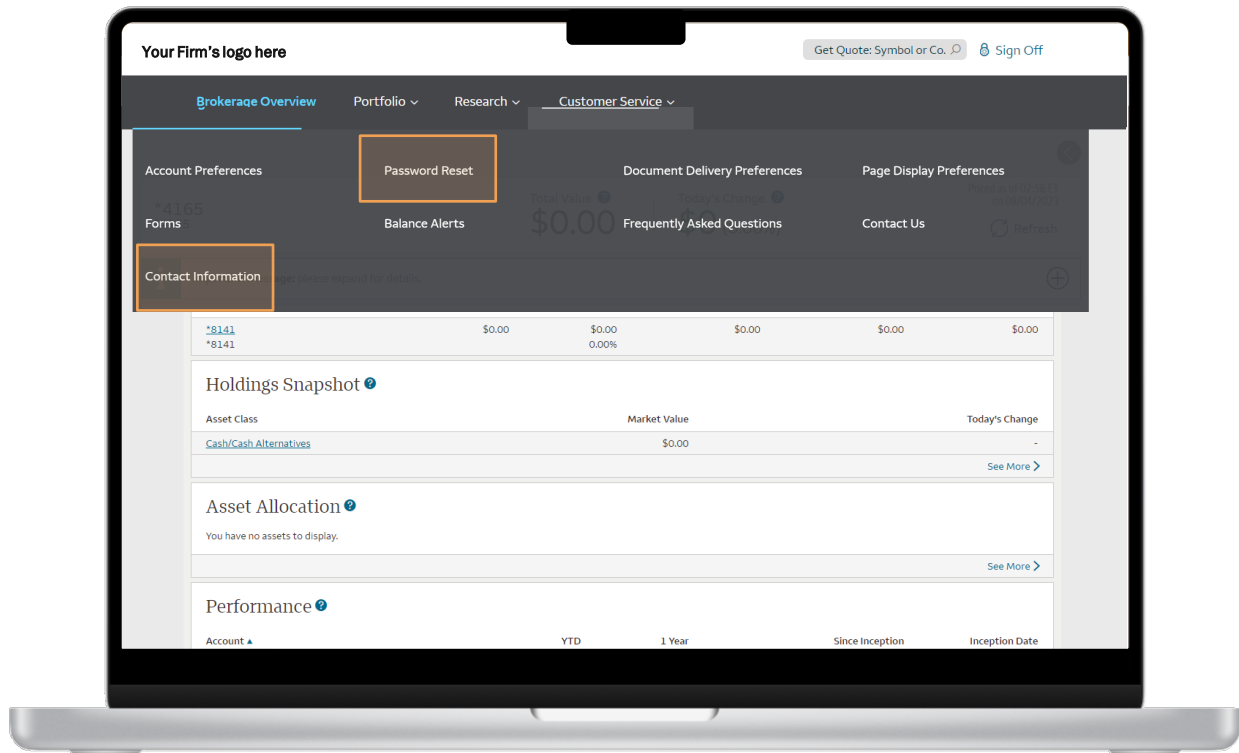
Existing User Login Experience progress bar

Existing User Login Experience

If you want to access and edit your Contact Information or Password you will need to verify your identity through secure validation.

Select the highlighted area, **Next**, or you can select **Back** to return to the previous page.

Back Next



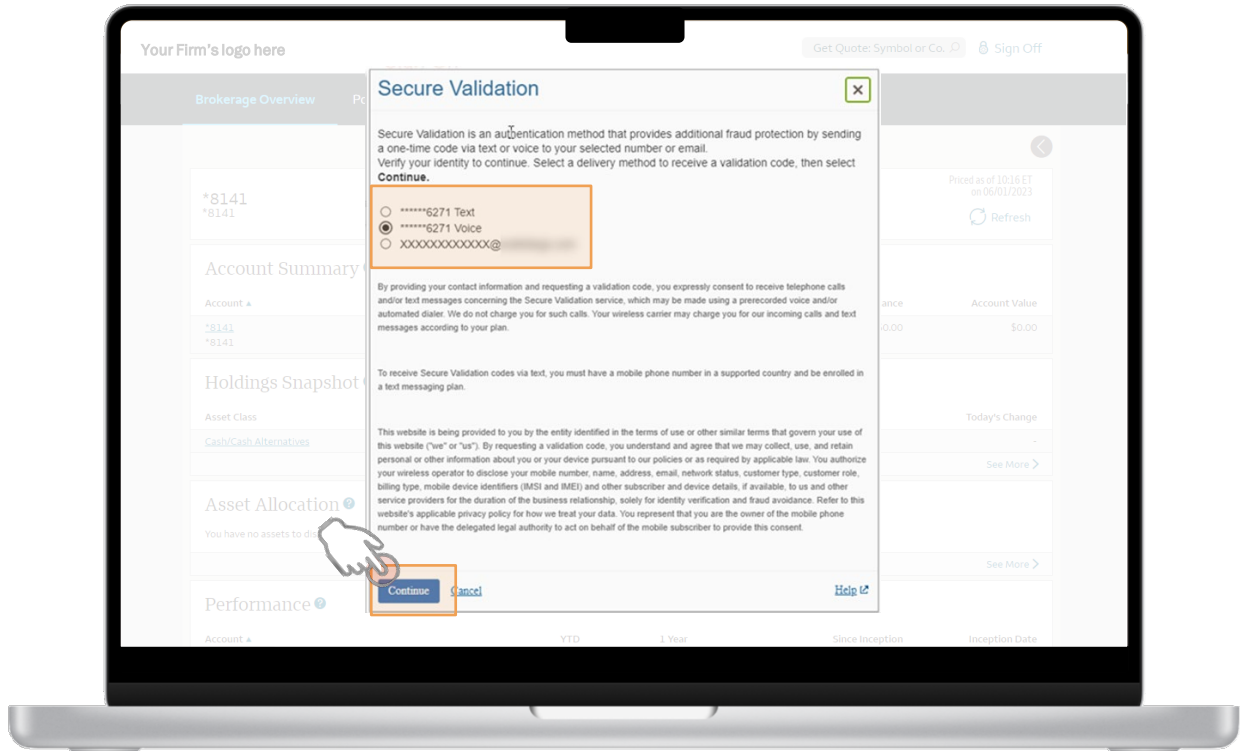
Existing User Login Experience progress bar

Existing User Login Experience

Select how you want to receive your code and press **Continue**.

Select the highlighted area, **Next**, or you can select **Back** to return to the previous page.

Back Next



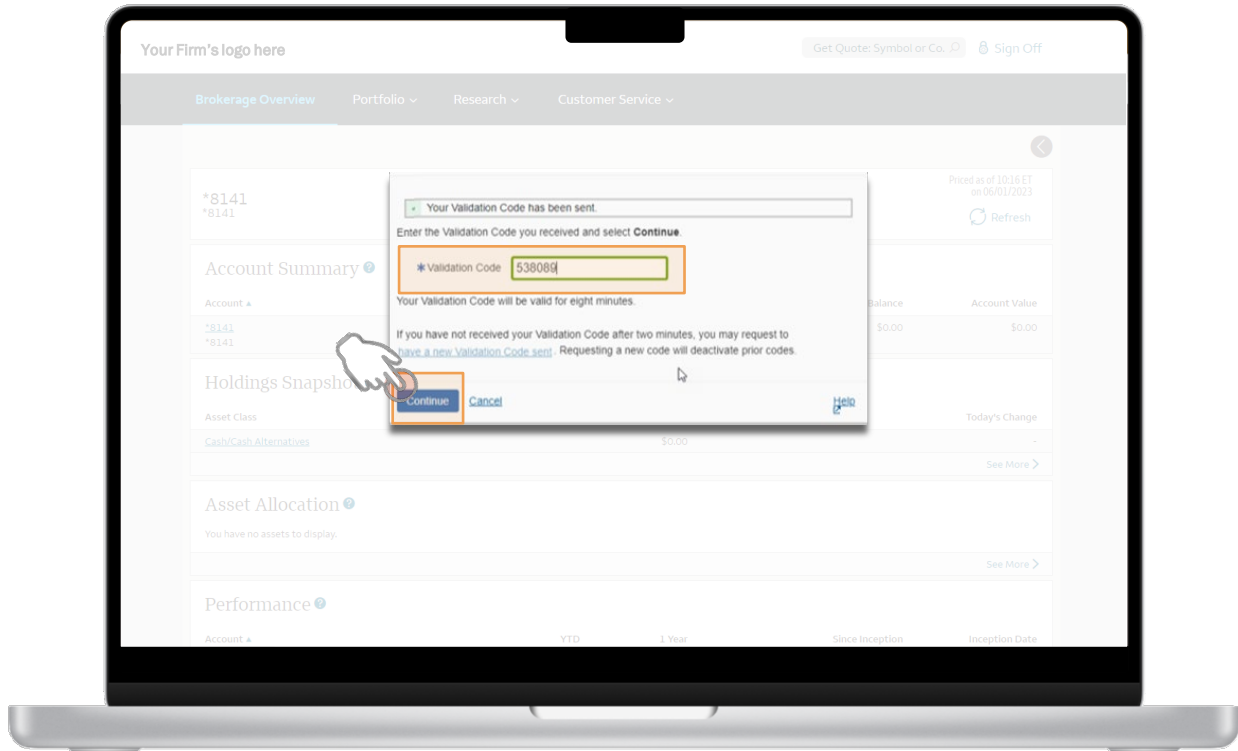
Existing User Login Experience progress bar

Existing User Login Experience

Enter the validation code that was sent to you by phone or email and then press **Continue**. Depending on your original selection, you will be automatically re-directed to the “Contact Information” or “Password Reset” screen.

You have reached the end of this section. Select **Next** to continue to the “Help” section of the guide, select **Back** to return to the previous page, or use the navigational menu at the top of the page.

Back Next



Help

If you have questions about your account or need additional assistance, please contact the financial professional listed on your account statement.