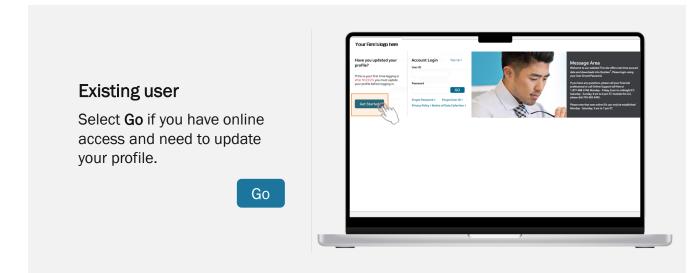


Welcome to the NEW log in experience guide for Access Online

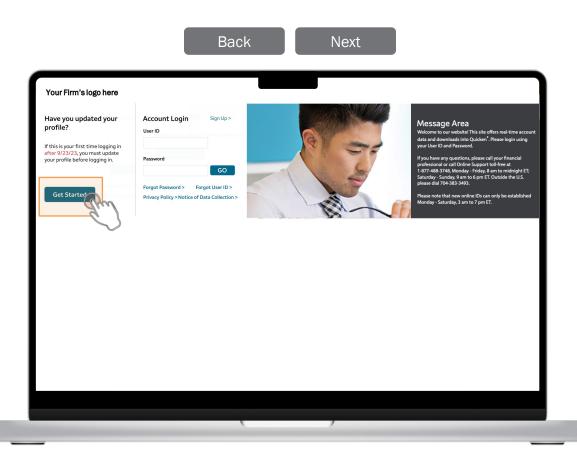
Access Online has moved to a two-factor authentication which provides enhanced security and improves the overall client login experience.

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 Login Experience

Select Get Started when first coming to the page.



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.

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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.

	here	
ve you updated file?		Message Area
	From: Application Access Support < <u>sit.support@accesswca.com</u> >	our website! This site offers real-time account wnloads into Quicken [*] . Please login using
	Sent: Friday, May 5, 2023 5:04 AM To:) and Password.
	Subject: Secure Validation Code - Your Firm's logo here	any questions, please call your financial for call Online Support toll-free at
		or call Online Support Iol-ree at 748, Monday - Friday, 8 am to midnight ET; unday, 9 am to 6 pm ET. Outside the U.S. 104-383-3493.
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		2.00
	Dear	87950>
	This is a service message to confirm you have requested a Secure Validation code.	Wednesday 12:01 PM
	The Validation code to verify your identity is 679155. This code will expire in 8 minutes.	The Secure
		Validation code to
	Enter this code in the Secure Validation code field and select continue to proceed.	verify your identity
		is <u>711067</u> . Please use this code now.
	Please do not reply to this email.	If you did not
		request this code,
		contact your
		customer support team.

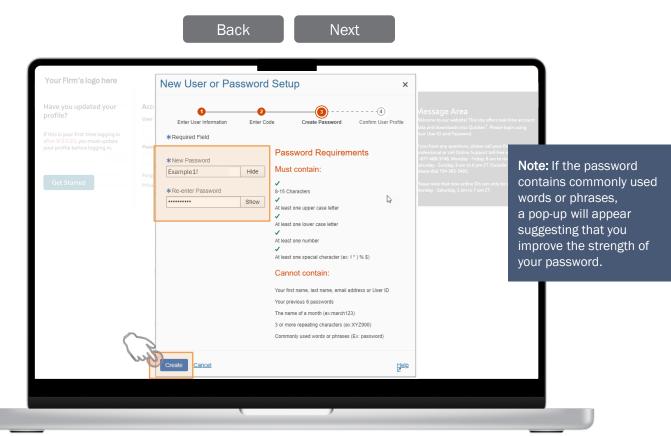
Existing User Login Experience

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

Your Firm's logo here		
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Get Started	Your Validation Code has been sent.	493. online IDs can only be establis am to 7 pm ET.
	Enter the Validation Code you received and select Continue .	
	Your Validation Code will be valid for eight minutes.	
	If you have not received your Validation Code after two minutes, you may request to have a new Validation Code sent. Requesting a new code will deactivate prior codes.	
	Continue Cancel Help	

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**.



Existing User Login Experience

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

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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.

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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.

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Existing User Login Experience

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

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	Secure Validation	
	Secure Validation is an autoentication method that provides additional fraud protection by sending a one-time code via text or voice to your selected number or email. Verify your identity to continue. Select a delivery method to receive a validation code, then select	
*8141 *8141	Continue. ○ *****6271 Text ● ******6271 Voice > >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	
Account Summary	By providing your contact information and requesting a validation code, you expressly consent to receive helephone calls and/or text messages concerning the Secure Validation service, which may be made using a prerecorded voice and/or	
	automated dialer. We do not charge you for such calls. Your wireless carrier may charge you for our incoming calls and text messages according to your plan.	
	To receive Secure Validation codes via text, you must have a mobile phone number in a supported country and be enrolled in a text messaging plan.	
	This website is being provided to you by the entity identified in the terms of use or other similar terms that govern your use of this website ('we' or 'us'). By requesting a validation code, you understand and agree that we may collect, use, and retain personal or other information about you or your device pursuant to our policies or as required by applicable law. You authorities the second other information about you or your device pursuant to our policies or as required by applicable law. You authorities the second other information about you or your device pursuant to our policies or as required by applicable law. You authorities the second other information about you or your device pursuant to our policies or as required by applicable law. You authorities the second other information about you or your device pursuant to our policies or as required by applicable law. You authorities the second other information about you or your device pursuant to our policies or as required by applicable law. You authorities the second other information about you or your provide the second other policies or as required by applicable law. You authorities the second other information about you or your provide the second other policies or as required by applicable law. You authorities the second other information about you or your policies or as required by applicable law. You authorities the second other information about you or your policies or as required by applicable law. You authorities the second other information about you or your policies or as required by applicable law. You applies the second other information about the second other information about you or your policies or as required by applicable law. You applies the second other information about you or you o	
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Performance @	Continue Cancel Help &	

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.

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	Your Validation Code has been sent. Enter the Validation Code you received and select C	Continue		
Account Summary @				
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Help

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