Pinnacle Investments, LLC
Member FINRA/SIPC

We are updating the way you access your investment accounts online.

Your investment firm, Pinnacle Investments LLC, will be upgrading the way you log in and access your investment account(s) online.

Your upgraded online access will include a more intuitive log on experience, improved web access from a mobile device and enhanced security features. This upgraded online access experience is hosted by Wells Fargo Online® and is made available through First Clearing who provides account statements, trade confirmations and other record-keeping, operational, clearing, and custodial services for our firm. First Clearing is a trade name used by Wells Fargo Clearing Services, LLC, member SIPC, a registered broker dealer and non-bank affiliate of Wells Fargo & Company.

What you need to know

- As part of this upgrade, you will be required to re-enroll your username and password on the new site.
- This process is an improved experience from previous password changes and should only take a few minutes to complete.
- Document delivery preferences will also be reset to paper delivery during the upgrade weekend. You will need to update your delivery preferences during the re-enrollment process if you prefer paperless delivery.
- Bill pay or online transfers scheduled through the current Access Online will be canceled after October 27, 2025.

Before September 26

- Review the enrollment guide to understand how the enrollment process will work.
- Make note of any third-party connections to services like Quicken® or TurboTax®; you will need to re-establish those after you re-enroll on the new website.

Note: On Friday, September 26, between 9:00 p.m. ET and 6:00 a.m. ET on Saturday, September 27, online access will be unavailable while our technology support teams complete website updates.

Starting on September 27

- Visit your firm's website and log in to your account. Follow the onscreen instructions to complete the re-enrollment process.
- Review and accept the *Wells Fargo Online* Access Agreement, accept exchange subscriber agreements, and set your document delivery preferences.
- This entire process should take less than 10 minutes to complete.
- Update any browser bookmarks or short cuts you may have saved pointing to the old client login page with the new web address.
- Re-establish any third-party connections to services like *Quicken* or *TurboTax*.
- Re-establish market alerts (if applicable).
- On occasion, you may receive account servicing notifications from Wells Fargo

If you have any questions or need further assistance, please reach out to the financial professional listed on your most recent account statement.

Enroll in online access

Investment products and services offered through your introducing broker, which is not affiliated with Wells Fargo & Company. Account(s) carried by First Clearing. First Clearing is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Please do not reply to this automated