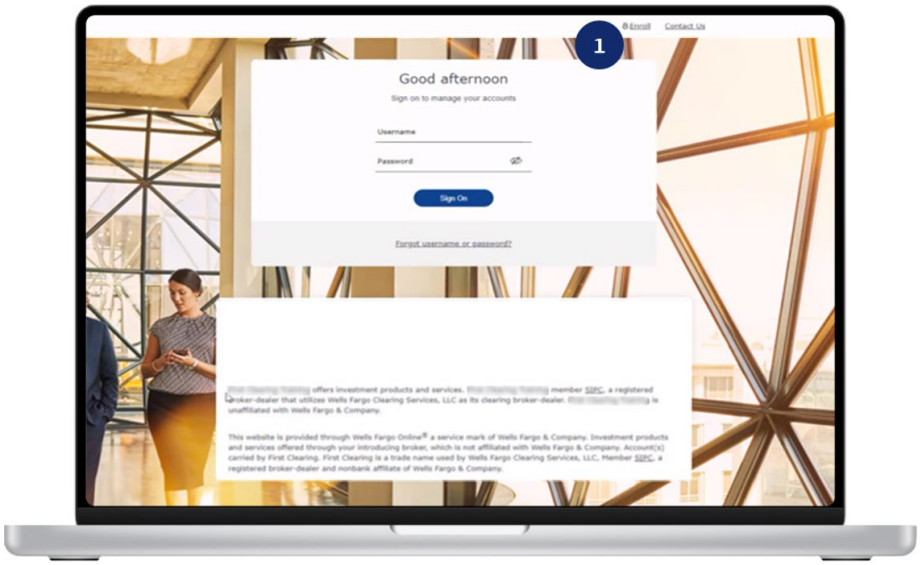
Enroll in online access

Steps for enrollment on mobile or desktop

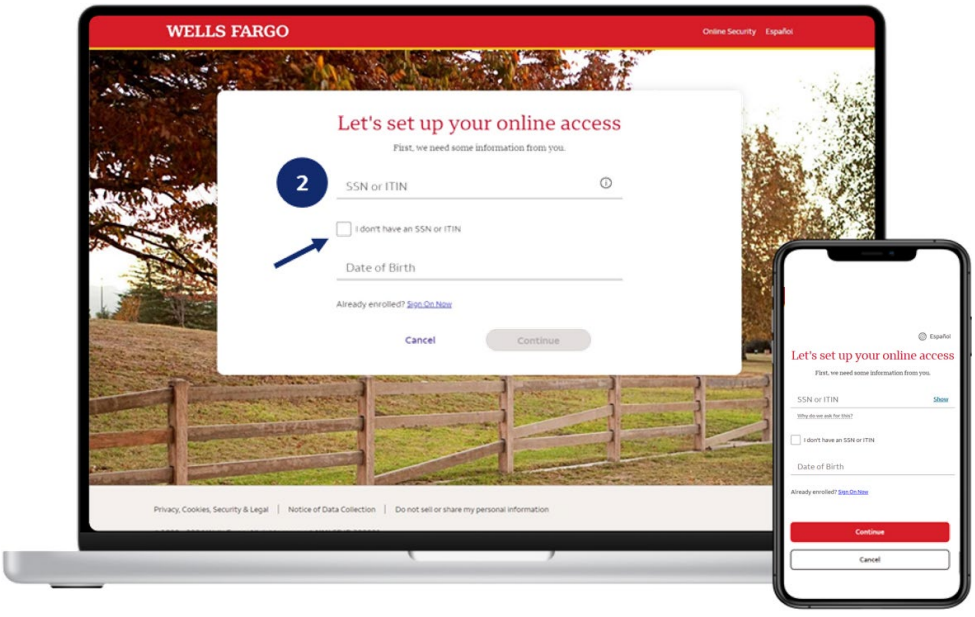
There are two options to enroll online:

- Visit your investment firm's client login/portal link to enroll from the web on a mobile device or a computer.
- Download the Wells Fargo Mobile® app[1] from the Google Play Store or the IOS App Store, or for more information visit the Wells Fargo Mobile app site.

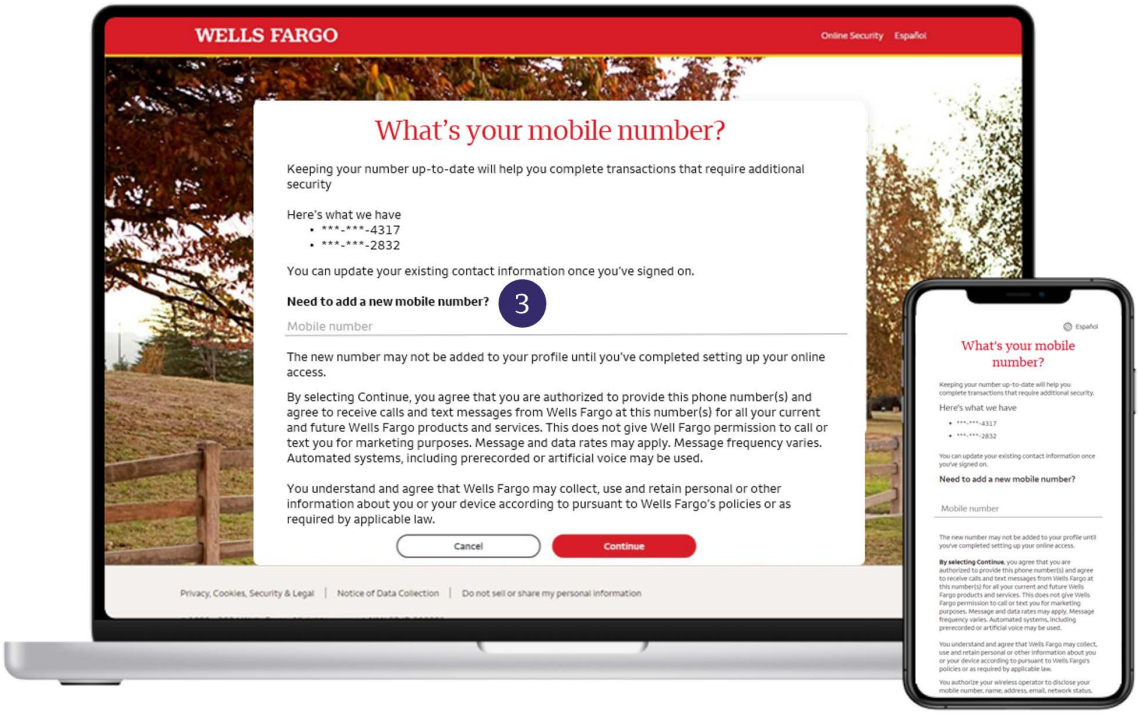
1. From a browser, visit the client login page from your investment firm's website and select **Enroll**.
   a. On the pop up screen, select **Continue**.



2. Enter your Social Security Number (SSN) or Taxpayer ID (TIN) and follow the steps to verify your identity. If you don't have a Social Security Number, select the box provided, and follow the prompts. You'll be asked for additional information to get started.



3. We will display the phone number(s) that we have on file. You can update your existing contact information once you've signed on. You are also able to add an additional mobile phone number on this step.



4. Use the menus to select a U.S. mobile phone number we have on file and a delivery method for receiving a One-Time Passcode (OTP). Once selected, press **Send Code**. If Wells Fargo doesn't have your U.S. mobile phone number, you'll be prompted to enter your debit or ATM card PIN instead.
   Note : If you don't have an eligible phone for OTP and you don't have a PIN number, call 866-552-3312 for assistance with enrollment.
5. Enter your email address and verify the address by entering it a second time. Then create your username and password using the specifications listed. Select **Continue**.
6. Sign on using the username and password you just created.
7. Read the "ESIGN Consent and Online Access Agreements." Mark each box to confirm you have read and agree to them. After checking the boxes, select **I agree**. You are complete and can begin using your digital access.
8. For future logins, sign on from your investment firm's website or from the Wells Fargo Mobile® app if you choose to download.

For enrollment assistance, contact your financial professional or call online support at: 1-866-552-3312.

1. Availability may be affected by your mobile carrier's coverage area. Your mobile carrier's message and data rates may apply.
2. Screen shots are simulated. Features, functionality, and specifications appearing in those images may changes without notice

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