

Gain online access

Now that your account is open, you can view and manage your account online

1



Visit:
www.advisorclient.com/getstarted.

2



Click **“Get Started.”** If your advisor provided you with a User ID, enter it here and then choose the validation method (phone or text/SMS). If you don't have a User ID, please enter your account number and follow the on-screen prompts.

3



A security code will be generated and provided to you via Phone or Text/SMS based on your choice in the previous step. Enter the Security Code where indicated.

[Continue to step 4](#)

4



If you entered your account number in Step 2, you'll now be able to create your unique User ID and password. If you entered a User ID provided by your advisor, you'll be prompted to enter a new password to continue.

5



If you're not already set up to receive communications electronically, you'll be prompted to subscribe to electronic communications here. Enter your email address and continue.

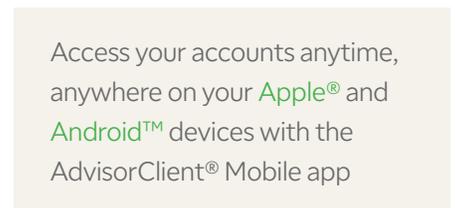
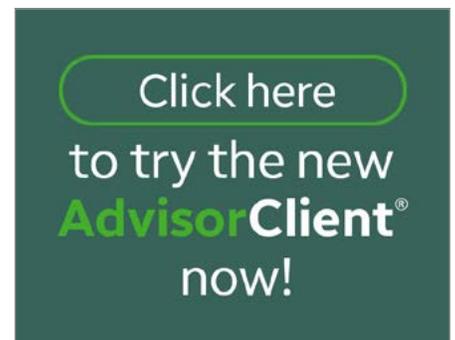
6



You're now logged in to [AdvisorClient.com!](http://AdvisorClient.com)

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

Once you're logged in to AdvisorClient.com, click **“Try the new AdvisorClient now”** to view the enhanced site and set it as your default. The next time you log in, you'll be taken directly to the enhanced site.



Go paperless

Going paperless is easy. To start receiving electronic account statements and trade confirmations securely online, simply follow the instructions below:

- 1 Log in to [AdvisorClient.com](#)
- 2 Click “STATEMENTS & TAX DOCUMENTS”
- 3 Under your list of documents, click “Communication Preferences”
- 4 Click “Go paperless. Set all to electronic delivery” and then confirm your preferences. You can also choose to receive only certain documents via electronic delivery by clicking “Update preferences individually”

The benefits of receiving electronic documents are plentiful

- ✓ More secure than mailing statements
- ✓ Better for the environment
- ✓ Faster delivery of account information
- ✓ Less clutter in your home and in your mailbox
- ✓ Locate documents online quickly and easily