

Wealthscape Investor
New User Registration and
Paperless Sign-up Guide



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New User Registration – User Created

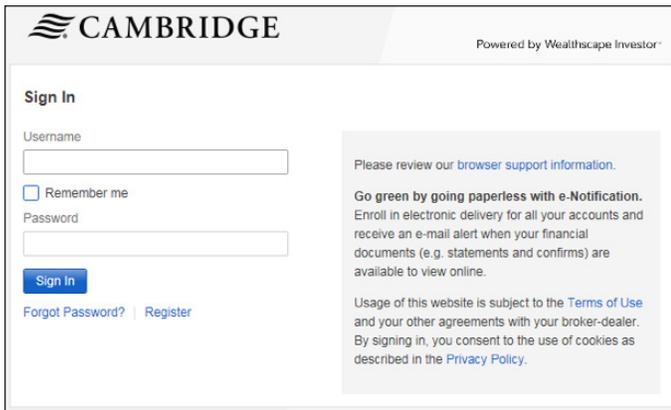
Wealthscape Investor New User Registration

The Wealthscape InvestorSM new user registration function allows you to register for access to Wealthscape Investor on your own. After registering, you will be able to access your brokerage account online and have the option to go paperless by signing up for e-notification. In order to register for Wealthscape Investor, you must have an active brokerage account with Fidelity Clearing & Custody SolutionsSM (FCCS) and have a Social Security number (SSN).

After registering, you will have access to all accounts on which you are listed as a holder. If you open new accounts, they will automatically be linked to your investor ID. All account holders listed on joint or trust accounts will have the ability to register for Wealthscape Investor access.

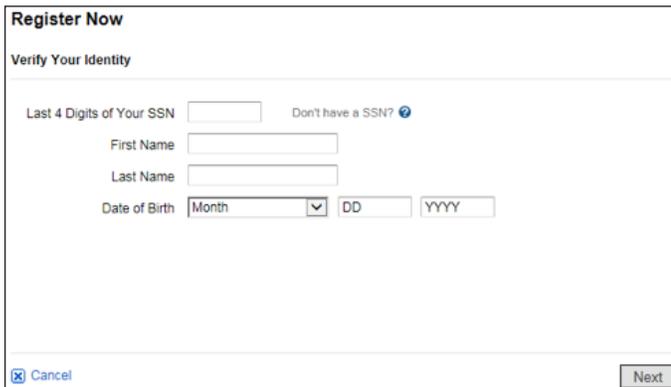
How to Register for a Wealthscape Investor ID

- Go to wealthscapeinvestor.com/cir. Click the **Register** link on the Login Page.



The screenshot shows the Cambridge Wealthscape Investor Sign In page. At the top left is the Cambridge logo, and at the top right, it says "Powered by Wealthscape Investor". The main heading is "Sign In". Below this, there are input fields for "Username" and "Password". A "Remember me" checkbox is located between the fields. A blue "Sign In" button is positioned below the password field. Below the button are links for "Forgot Password?" and "Register". To the right of the input fields, there is a grey informational box containing the following text: "Please review our [browser support information](#). Go green by going paperless with e-Notification. Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online. Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#)."

- Enter the last four digits of your SSN, your first and last name, your date of birth, and click **Next**



The screenshot shows the "Register Now" page with the heading "Verify Your Identity". It contains several input fields: "Last 4 Digits of Your SSN" with a text box and a "Don't have a SSN?" link; "First Name" with a text box; "Last Name" with a text box; and "Date of Birth" with a dropdown menu for "Month", a text box for "DD", and a text box for "YYYY". At the bottom left is a "Cancel" button with a close icon, and at the bottom right is a "Next" button.

- Enter the account number you wish to access and click **Next**

Register Now

Verify Your Identity

Enter Your Account #

- Create and verify your new password
- Select a security question and type your answer in the box below. Then, re-enter your answer and click **Next**.

Register Now

✓ Verify Your Identity | **Register** | Confirmation

Create New Password

Retype New Password

Password Strength: Weak

Password Guidelines
Your password must be 6-20 characters and include 3 of the following:
Number
Special character
Capital letter
Lowercase letter

Note: You may not reuse a previous password.
What is a strong password?
To create a strong password, Fidelity recommends your password include the following:
At least one special character: % ^ () + , . - / ; : = ? \ * _ | ~ ! \$ @
No easily recognized sequences (e.g., 12345 or 11111)
No personally identifiable information (e.g., Social Security Number, telephone number, or date of birth)
Example of a strong password:
KingHenryThe8%^(

Create Your Security Question
If you need to reset your password, you will be asked your security question to verify your identity.

Security Question

Answer

Re-enter Answer

- The confirmation window will display when your registration was successful

Register Now

✓ Verify Your Identity | ✓ Register | **Confirmation**

Your registration was successful.

User ID

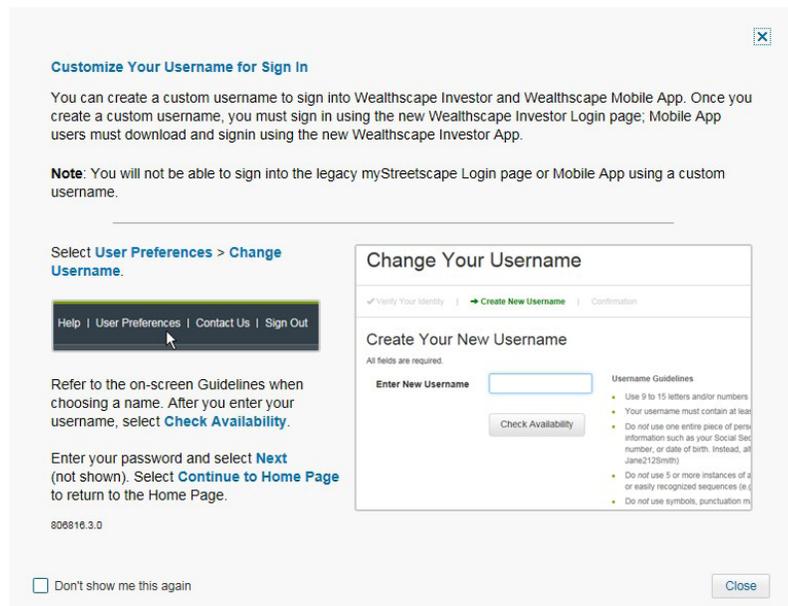
Note: Please record your User ID for future use. You will be required to enter this User ID and your password every time you log in to your account.

[Continue to home page](#)

- Print the confirmation page by clicking the **Print** icon
- Click **Continue to home page** to proceed directly to the page that contains all your account information

Customize Your Username for Sign In

You can create a custom username to sign into Wealthscape Investor and the Wealthscape Mobile App. Once you create a custom username, you must sign in using the new Wealthscape Investor login you created.



The screenshot shows a dialog box titled "Customize Your Username for Sign In". It contains the following text:

Customize Your Username for Sign In

You can create a custom username to sign into Wealthscape Investor and Wealthscape Mobile App. Once you create a custom username, you must sign in using the new Wealthscape Investor Login page; Mobile App users must download and sign in using the new Wealthscape Investor App.

Note: You will not be able to sign into the legacy myStreetscape Login page or Mobile App using a custom username.

Select [User Preferences](#) > [Change Username](#).

Help | [User Preferences](#) | [Contact Us](#) | [Sign Out](#)

Refer to the on-screen Guidelines when choosing a name. After you enter your username, select [Check Availability](#).

Enter your password and select [Next](#) (not shown). Select [Continue to Home Page](#) to return to the Home Page.

808816.3.0

Don't show me this again [Close](#)

Change Your Username

✓ Verify Your Identity | **→ Create New Username** | Confirmation

Create Your New Username

All fields are required.

Enter New Username

[Check Availability](#)

Username Guidelines

- Use 9 to 15 letters and/or numbers
- Your username must contain at least one letter and one number
- Do not use one entire piece of personal information such as your Social Security number, or date of birth. Instead, all Jane123Smith
- Do not use 5 or more instances of a single character or easily recognized sequences (e.g., 11111, 12345)
- Do not use symbols, punctuation or spaces

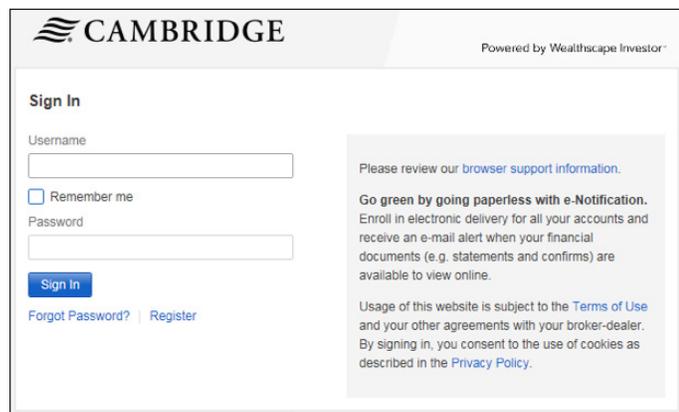
New User Registration – Cambridge Created

If you wish to have Cambridge complete your new user registration for Wealthscape Investor, please contact your advisor who will fill out a Wealthscape Investor Authorization Form.

Once your user registration is created, Cambridge will email your username and password to your advisor who will be responsible for emailing that information to you. Once registered, you will be able to access your brokerage account online and have the option to go paperless by signing up for e-notification. In order to register for Wealthscape Investor, you must have an active brokerage account with FCCS and have a SSN.

Log In

Go to wealthscapeinvestor.com/cir and enter your username and password that was provided by your advisor and click **Sign In**.



The screenshot shows the Cambridge Wealthscape Investor Sign In page. It features the Cambridge logo and the text "Powered by Wealthscape Investor". The page has a "Sign In" section with a "Username" field, a "Remember me" checkbox, and a "Password" field. Below these fields is a blue "Sign In" button. There are also links for "Forgot Password?" and "Register". On the right side, there is a grey box with the following text:

Please review our [browser support information](#).

Go green by going paperless with e-Notification. Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online.

Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#).

You will be prompted to create a new custom password and select a security question.

Create a New Password

Enter New Password | Confirmation

Your password is no longer valid. Please create a new one.

Enter Current Password

Create New Password

Retype New Password

Password Strength: Weak

Password Guidelines

Your password must be 6-20 characters and include 3 of the following:

- Number
- Special character
- Capital letter
- Lowercase letter

Note: You may not reuse a previous password.

What is a strong password?

To create a strong password, Fidelity recommends your password include the following:

- At least one special character (% ' { } ~ , . / : = ? ! * _ - + \$ @)
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g., Social Security Number, telephone number, or date of birth)

Example of a strong password: KinghenryThe5th!

Create Your Security Question

If you need to reset your password, you will be asked your security question to verify your identity.

Security Question

Answer

Re-enter Answer

[Cancel](#) [Next](#)

The confirmation page will display when your password and security question have been set up successfully. Click **Continue to home page**.

Create a New Password

Enter New Password | Confirmation

You have successfully created a new password

You have successfully created a security question

[Continue to home page](#)

Additional Security Questions

Once logged in, you will be prompted to enter additional security questions for your username. Click **Add Security Questions**. If you click **Skip Questions for Now**, the next time you log in, you will be required to add the additional security questions.

Help Us Protect Your Login Experience

Your security is our priority. To further safeguard your login experience, we are requiring all customers to create security questions/answers.

How it Works

- You add security questions and answers to enhance the security of the login experience.
- We may prompt you with one of these questions if unusual login behavior is detected.

What You Need to Do

- Choose three security questions and create answers known only to you.

Note that if you prefer not to add your security questions at this time, you'll be required to do so the next time you log in.

[Skip Questions for Now](#) [Add Security Questions](#)

All links open in a new window.

About Security Questions

- Why is my online experience changing?

After you have selected your security questions and provided your answers, click **Submit**

Add Your Security Questions & Answers

Security Guidelines

- Answers must be between 3 and 31 characters
- Answers can contain both letters and numbers
- Special characters, such as & and (), are not allowed
- Answers are not case sensitive
- Choose questions with clear answers that you can easily remember

Add Security Questions & Create Your Answers

These may be used to further verify your identity during log in.

All fields are required.

Question:

Answer:

Repeat Answer:

Question:

Answer:

Repeat Answer:

Question:

Answer:

Repeat Answer:

Do you frequently use this computer to access this web site?

Yes

No

Note: If you are using a public computer, you should always select No.

The confirmation window will display when your security questions were successful, click **Next**

Confirmation: Your security questions are now in place.

✔ Congratulations! Your login experience has been updated with enhanced security.

To make any changes to your security questions and answers, go to User Options.

The user agreement will appear after completing your security questions. Once you have read the terms, click **Accept** at the bottom of the screen.

Terms of Use > User Agreement

END-USER AGREEMENT

1. Cambridge Investment Research ("Company"), hereby grants you a nonexclusive, nontransferable license for the term of this Agreement to access and use, Company Internet-based securities trading services, as may be amended from time to time (the "Product"). The Product is available through the World Wide Web with protocol of the Internet, and allow you to obtain information concerning your brokerage account with Company, enter orders in such account to buy and sell certain securities, stock options and mutual funds, and obtain quotations and other information (some of which may be provided by third parties). You agree not to assign, sublicense or otherwise convey or transfer your rights under this Agreement to another person or entity. Though orders are usually routed to the marketplace within seconds, certain orders, at Company's sole discretion, may be subject to manual review and entry, which may cause delays in the processing of your orders. You also understand that you will realize the price at which your order executes in the marketplace, which may be different from the price at which the security or option is trading when your order is entered into the Product. When you place a request to cancel an order, the cancellation of that order is not guaranteed. Your order will only be canceled if your request is received in the marketplace and matched up with your order before your order execution. Market orders are subject to immediate execution. During market hours, it is rarely possible to cancel your market order. Please do not assume that any order has been executed or canceled and you have received a transaction confirmation from Company. Also, please be aware that Company, from time to time, receives late reports from exchanges and market makers reporting the status of transactions, accordingly, you will be subject to late reports related to orders that were conclusively unreported to you or reported to you as being executed, canceled, or executed. In addition, any reporting or posting errors, including errors in execution prices, will be corrected to reflect what actually occurred in the marketplace.

2. You shall be the only authorized user of the Product under this Agreement. Data, information and services accessible through the Product may be displayed, reformatted and printed for your personal, noncommercial use only. You agree to keep confidential and not cause or permit such data, information or services to be published, broadcast, retransmitted, reproduced, commercially exploited or otherwise re-disseminated. You agree not to create any derivative works (including databases) based on the Product or any data, information or services contained therein.

3. You understand that all the terms and conditions of your Customer Account Agreement with Company and Company's Agreement with its clearing agent, National Financial Services Corp. (the "Clearing Agent"), including margin and options agreements, if applicable and any applicable prospectus, control the operation of your account. Hereto and those terms and conditions are incorporated herein by reference. You acknowledge the Product may involve the transmission to you of information that may be considered personal financial information, including but not limited to the identity and number of shares that you trade and the net dollar price for the shares. You acknowledge that Company cannot assure the security of electronic transmission of such information over the Internet. You consent to the transmission by electronic means of such information through the Product, such consent shall be effective as all times that you use the Product.

4. Your use of the Product requires your receipt from Company and use of a unique identification number ("ID") and associated password ("Password"). You hereby agree to maintain your ID and Password in strict confidence. You understand that you shall be solely responsible for all actions entered through the Product using your ID and Password. Company may at all times rely upon and act in accordance with any instructions or inquiries, written or oral, direct or indirect, or otherwise. All instructions communicated to us using your ID and Password will be considered to have been sent by you. Due to the nature of the Internet, the limited security mechanisms associated with the Product and the inherent limitations of such mechanisms, Company cannot ensure the privacy, security or authenticity of our communications with the Product, accordingly, you must assess whether the use of the Product or the Internet is acceptable to meet your particular needs. Further information on this topic may be obtained from Company. The site and storage of any information, including without limitation, the ID, the Password, portfolio information, transaction activity, account balances, and any other information or notes available on your personal computer, is at your own risk and is your sole responsibility. You are responsible for providing and maintaining the communications equipment (including personal computer and modem) and telephone or alternative services required for accessing and using the Product and for all communications service fees and charges incurred by you in accessing the Product.

Verify Your Identity/Security Enhancements

Once logged in, it will prompt you to verify your identity. Input the last four digits of your SSN, first name, last name, and date of birth, then click **Submit**.

Verify Your Identity

Complete this verification form if you are one of the account owners. If you are not an account owner click here.

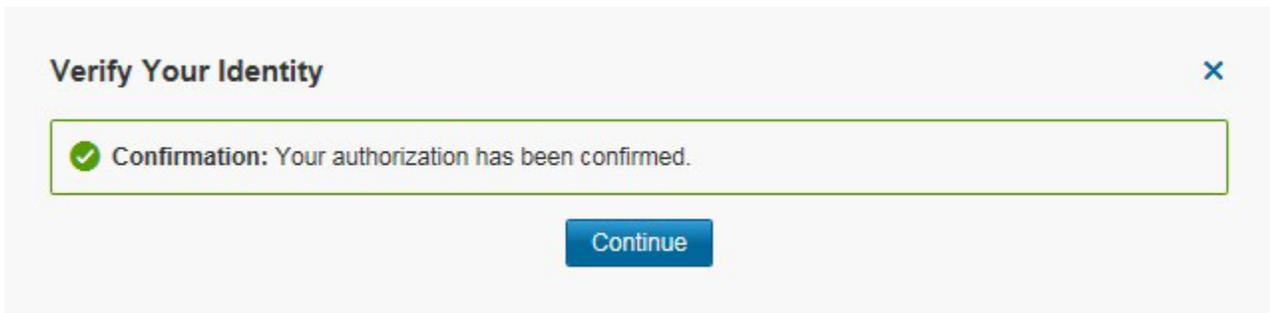
Last 4 Digits of Your SSN

First Name

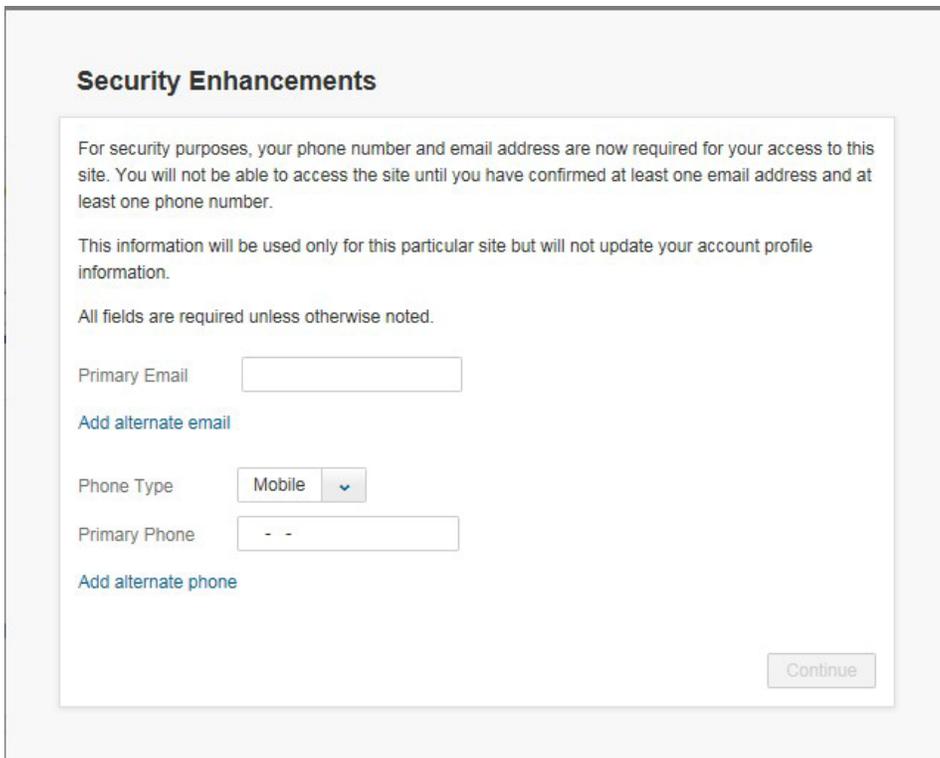
Last Name

Date of Birth

The confirmation page will display once your identity has been verified.



You will be prompted to input security enhancement information. This information will be your primary email and phone number, which must be entered in order to continue to the Wealthscape Investor site. Click **continue**.

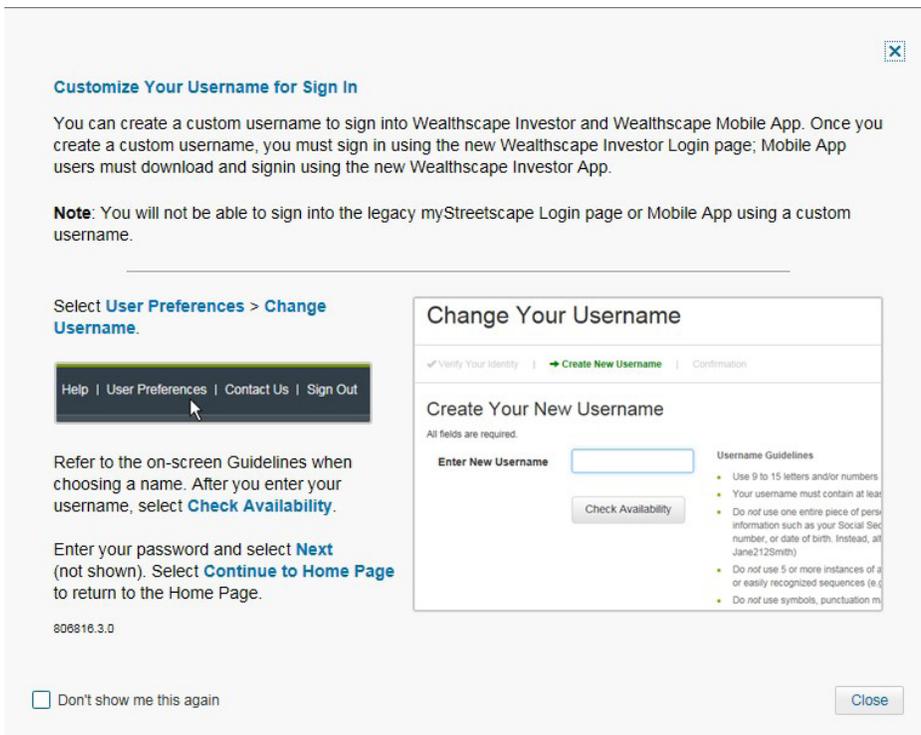
A screenshot of a "Security Enhancements" form. The form title is "Security Enhancements". Below the title is a text block explaining that phone number and email address are required for access. It states that the information is used only for this site and does not update the account profile. A note says "All fields are required unless otherwise noted." The form contains the following fields: "Primary Email" with an empty text input box and a link "Add alternate email"; "Phone Type" with a dropdown menu currently set to "Mobile"; "Primary Phone" with an empty text input box containing dashes and a link "Add alternate phone". A "Continue" button is located at the bottom right of the form.

Once the security enhancement information has been accepted, click **Submit**.

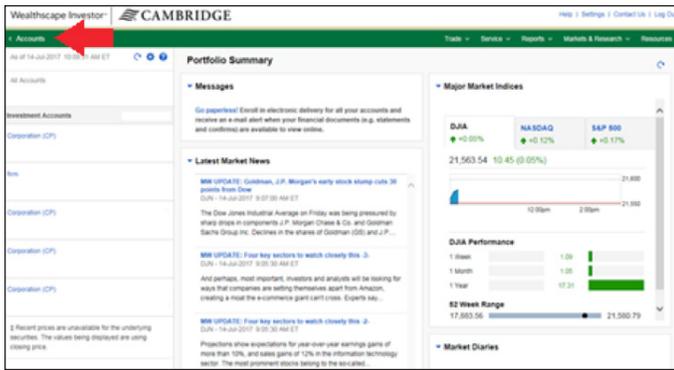


Customize Your Username for Sign In

You can create a custom username to sign into Wealthscape Investor and the Wealthscape Mobile App. Once you create a custom username, you must sign in using the new Wealthscape Investor login you created.



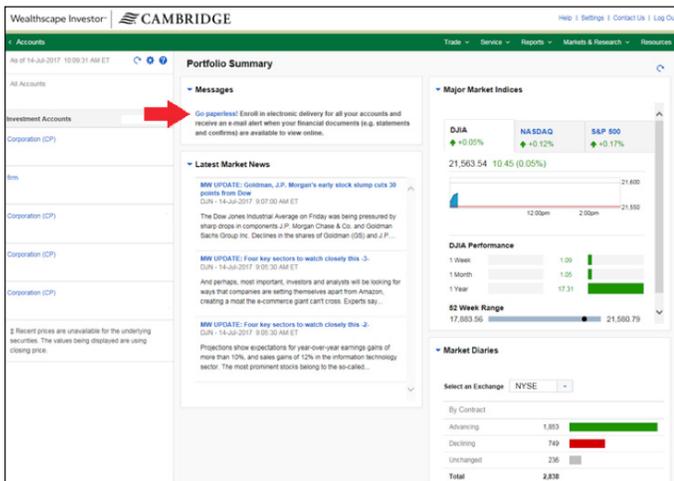
Your Wealthscape Investor account homepage will appear. To view your accounts, click **Accounts** in the top left corner of the screen. On the Accounts page, you will find a general overview of each account associated with your username.



Go Paperless

You can enroll in electronic delivery (eDelivery) for all accounts. Wealthscape Investor will send an email alert when financial documents (e.g., statements and confirmations) are available to view online.

To sign up for paperless options, click **Go paperless!**



Under Document Delivery Instructions, select the circle next to **Electronic Delivery** for each account you would like eDelivery setup with. If you wish to setup eDelivery for all account, select the box next to **Set all documents to electronic delivery**. Once you have selected your options, click **Save This Account**.

Document Delivery Instructions *Indicates required field. ?

Rather than sending paper-based mail, we will send you an e-mail alert when your financial documents are available to view online.

Select and save each account separately

frm	Enrolled
Corporation (CP)	Not Enrolled

E-Mail Address* [Edit E-Mail](#)

Document Delivery Instructions Set all documents to electronic delivery

Confirms/Confirming Prospectuses	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Statements & Regulatory Inserts	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Eligible Customer Correspondence	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Shareholder Reports (including Prospectuses) & Other Documents	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Tax Forms & Related Disclosures	<input type="radio"/> Electronic Delivery	<input checked="" type="radio"/> U.S. Mail

Selecting either option above will still allow you to access your documents online.

Close

Add or Edit Email Address

On the same screen, if you wish to add or edit your email address, click **Edit E-Mail**.

Document Delivery Instructions *Indicates required field. ?

Rather than sending paper-based mail, we will send you an e-mail alert when your financial documents are available to view online.

Select and save each account separately

frm	Enrolled
Corporation (CP)	Not Enrolled

E-Mail Address* [Edit E-Mail](#)

Document Delivery Instructions Set all documents to electronic delivery

Confirms/Confirming Prospectuses	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Statements & Regulatory Inserts	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Eligible Customer Correspondence	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Shareholder Reports (including Prospectuses) & Other Documents	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Tax Forms & Related Disclosures	<input type="radio"/> Electronic Delivery	<input checked="" type="radio"/> U.S. Mail

Selecting either option above will still allow you to access your documents online.

Close

Enter your email address in both boxes and click **Apply** in the bottom right corner of your screen. The box will disappear, bringing you back to the Document Delivery Instructions box.

Add E-Mail ✕

*Indicates required field.

Enter an e-mail address below. We will use this address for electronic delivery and as the account holder's e-mail address on file.

*Account Holder

*E-Mail Address

*Verify E-Mail Address

Cancel

Electronic Notification Agreement

Per SEC regulations, a client must give informed consent to stop the mailing of paper statements and confirmations. Due to these regulations, the client must read and accept the license agreement.

Electronic Notification Agreement

Warning: In order to sign up for online delivery of account documents, you must read and accept the agreement below.

Electronic Delivery Agreement

To receive electronic notification that documents are available for you to view online in an electronic format rather than receiving paper documents through the U.S. Mail, you must confirm your consent by reviewing and agreeing to the terms and conditions of this Agreement and by indicating your selection(s) on the Web site page provided to you.

Please be sure to read this Agreement in its entirety as it contains important information that is required by law to be provided to you.

Currently, certain documents are not included in the electronic notification program and will continue to be delivered to you via U.S. Mail. However, in the future some or all of these documents may be made available for you to view online in accordance with this Agreement.

If at any time after consenting to the electronic notification program you wish to receive a paper copy of a document made available to you for online viewing, you will need to request such paper copy from your broker-dealer and/or their agents, who may charge you a fee for such copy.

Notification of Availability of Documents

Your broker-dealer, its clearing firm National Financial Services LLC (NFS), or their respective agents will notify you by e-mail or other electronic means when an account statement, possibly with related inserts, trade confirmation and related prospectuses, tax forms*, or other documents are available for online viewing. If you

I do not agree | I agree

After accepting the Electronic Notification Agreement, you will return to the main page. Please confirm that your settings are correct.

You are now set up to receive eDelivery. You will receive electronic email notifications which will include a link or URL where the document(s) can be accessed, viewed, and printed. You will be provided with instructions on how to access the documents.

Forgot/Reset Password

If you have forgotten your password or wish to reset your password, visit wealthscapeinvestor.com/cir and click **Forgot Password?**

CAMBRIDGE Powered by Wealthscape Investor

Sign In

Username

Remember me

Password

Sign In

[Forgot Password?](#) | [Register](#)

Please review our [browser support information](#).

Go green by going paperless with e-Notification.
 Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online.

Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#).

Enter your username and click **Next**.

Answer your security question and click **Next**.

Create and verify your new password and click **Next**.

Forgot/Reset Password

✓ Enter Your Username | ✓ Answer Your Security Question | ➔ **Create New Password** | Finish

Create New Password

Password Strength: Weak

Retype New Password

Password Guidelines

Your password must be 6-20 characters and include 3 of the following:

- Number
- Special character
- Capital letter
- Lowercase letter

Note: You may not reuse a previous password.

What is a strong password?

To create a strong password, Fidelity recommends your password include the following:

- At least one special character: % ' () + , . - / : ; = ? \ ^ _ | ~ ! \$ @
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g. Social Security Number, telephone number, or date of birth)

Example of a strong password:
KingHenryThe8%^{

The confirmation window will display when your new password was created successfully, click **Continue to home page.**

Forgot/Reset Password

Enter Your Username | ✓ Answer Your Security Question | ✓ Create New Password | ➔ **Finish**

You have successfully reset your password

[Continue to home page](#)

If you have questions, please contact your advisor.



1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080

*Please note: If you do not sign up for paperless statements, they will be delivered to you via U.S. Mail. You will need to complete the same steps for all of your accounts. If at anytime after consenting to the electronic notification program you wish to receive a paper copy of a document made available to you for online viewing, you will need to request the paper copy from Cambridge.

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