

FirstClearing

A trade name of Wells Fargo Clearing Services

Enroll for Access Online

If you would like to have online or mobile access to your Advantage Program, IRA, or Investment (Brokerage) account:

1. Select the “Sign Up” link from your firm’s Access Online login screen.
2. Enter your account information and answer a few personal questions to verify your identity.
3. Once verified, enter the account numbers you would like to view online.
4. Create a user ID and password to access your accounts.
5. To complete your online enrollment, create three security questions and answers for future password resets.
6. Upon your initial login, you will be presented with an Online Agreement which will need to be reviewed and accepted only once.

For enrollment assistance, please contact Access Online Support at 1-877-488-3748, 24 hours a day, 7 days a week.

The image displays three screenshots from the FirstClearing website illustrating the online enrollment process.

The top screenshot shows the "Account Login" screen with a "Sign Up >" link. Below the login fields, there are links for "Forgot Password >" and "Forgot User ID >". A progress bar at the bottom indicates the enrollment steps: 1. Enter Information (highlighted in green), 2. Verification, 3. Accounts, and 4. Create User ID.

The middle screenshot shows the "Online Enrollment" page under the "Enter Information" step. It prompts the user to "Please enter the following information to create your userid and password. All fields are required." The "First Name" field is visible with an input box.

The bottom screenshot shows the "Brokerage Overview" page. At the top, it displays "TOTAL VALUE \$2,036,049" and "TODAY'S CHANGE -\$81,591 (-3.01%)". Below this is an "Account Summary" table:

Account #	Securities Market Value	Today's Change	Cash & Cash Adj.	Margin Balance	Account Value
0123	\$95,789.40	+\$100.00 +0.11%	\$150,413.87	-\$90,021.76	\$156,285.49
5678	\$2,530,462.00	-\$1,497.68 -0.12%	-\$743,998.79	\$110,000.00	\$1,877,465.71
On Total	\$2,626,251.40	-\$61,397.68 -0.61%	-\$593,584.92	\$163,772.22	\$2,036,049.22

Below the table is a "Holdings Snapshot" section with a table showing "Asset Class", "Market Value", and "Today's Change".

Asset Class	Market Value	Today's Change
Stocks	\$166,787.22	+\$180,461 (+0.71%)

Electronic Delivery of Account Documents

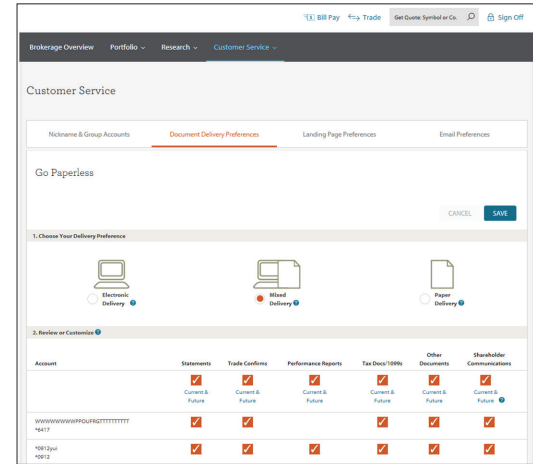
With Access Online, you can securely access up to seven years of account documents, such as Statements, Trade Confirmations and Tax Documents/1099s, as soon as they are created — before they reach your mailbox.

Go paperless and choose electronic delivery of account documents and shareholder communications:

1. Login to Access Online and in the Customer Service menu, select **Document Delivery Preferences** from the sub menu.
2. Choose ‘Electronic Delivery’ of all account documents, or check the boxes for the account documents you wish to have delivered electronically.
3. Select an email address to which a notification can be sent when a document is available to view online.
4. If you have chosen electronic delivery of Shareholder Communications, create a 4 digit PIN to use when voting your proxy shares online.
5. Click the Save button and review the **Disclosure Statement Regarding Electronic Delivery of Documents**. By accepting the disclosure statement, you will turn off paper delivery of your selected documents sent through the mail.

To view your account documents online, select **Statements & Docs** from the sub menu within the Portfolio menu.

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Investment and Insurance Products:

▶ NOT FDIC Insured ▶ NO Bank Guarantee ▶ MAY Lose Value

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