

## **Account Groups**

Stifel Wealth Tracker gives Stifel clients the convenient ability to create groups to view accounts in the way that works best for them. Clients can also create a default group, which will allow them to set which group they would like to see upon login. Follow the instructions below to create an account group and/or default group.



Sign in to Stifel Wealth Tracker at **www.stifelwealthtracker.com**. Select **Manage Accounts** from the lefthand navigation menu, then select **Create** from the **Account Groups** option.



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Create a **Group Name** and select the account(s) to be included in the group as indicated below. **Note:** To set this group as the **default** (if enabled, this group will be selected instead of all accounts on the home page), toggle the button shown below to select **ON**. Select **Save** at the bottom of the page when finished.

< Create Account Group	
Group Name *	
Set this group as default If enabled, this group will be selected instead of all account	ts on Home
Select Accounts	
2 Accounts	\$10,712.00
John Doe Associated   6311 Stifel	\$5,710.28
Wealth Tracker Prod TESTS Associated   6310 Stifel	\$5,001.72





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## **Account Groups**

After successfully creating a group, the **Account Groups** page will load showing the new group and any existing groups.

To edit an existing Account Group, select **Edit Account Groups**.

Manage Accounts	<b>Designed</b>	and the second
My Financial Advisor		
My Documents ~		and the second se
Settings v		
Important Information V		
Log Off		Account Groups
	$\sim$	Organize accounts and assets into groups in the account selection menu.
		Create Edit Account Groups
< Account Groups		
Organize accounts and assets menu.	into groups in the account selection	Create Group
New Group		12/Edit
2 Accounts 🗸		E Loit
7 Accounts		<b>[2</b> <sup>9</sup> <b>E</b> dit

## **Questions?**

Contact Stifel Wealth Tracker at (866) 697-8433 or wealthtracker@stifel.com.

Monday – Friday 6:00 a.m. – 7:00 p.m. Central **Saturday** 7:30 a.m. – 4:00 p.m. Central