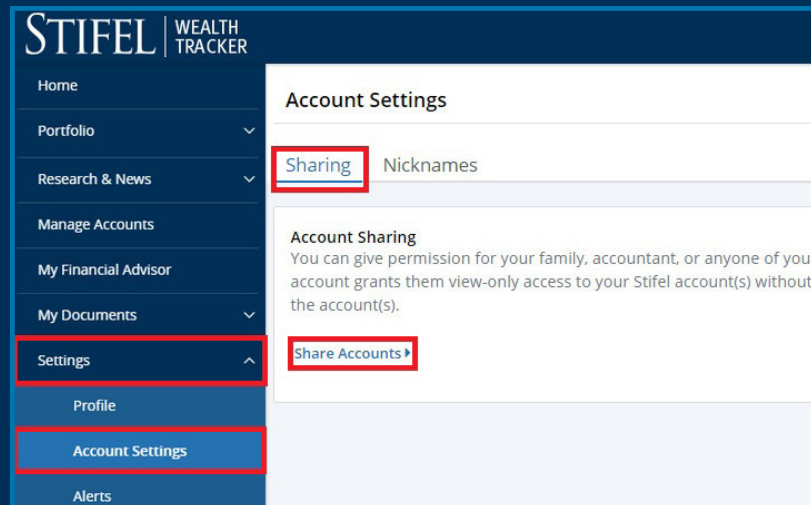
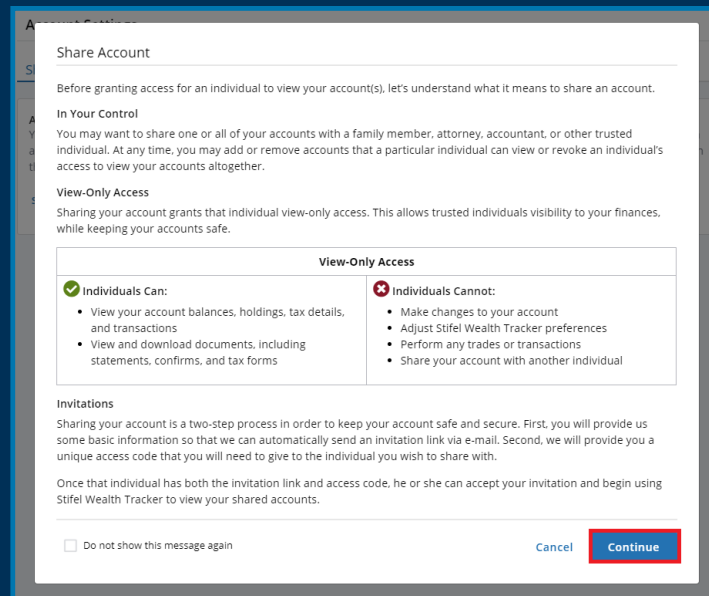


How to Share Accounts

- 1 Sign in to Stifel Wealth Tracker at www.stifelwealthtracker.com. Select **Settings**, then **Account Settings** from the left-hand navigation menu, then select **Share Accounts** from the **Sharing** tab.



- 2 Carefully review the features of sharing your account; if you agree to the guidelines, select **Continue**.



How to Share Accounts

- 3 Complete the E-Mail Address, Mobile Number, and the Name of the trusted individual, and select the accounts to share from the list on the right. Select **Share** when finished. **Please Note:** Some accounts may not be eligible to share.

Share Account

Email Address
johndoe@stifel.com

Mobile Number
(314) 342-2251

Name
John Doe

Relationship
Optional

My Accounts
5 Accounts

Jane Doe
1111-1111

Jane Doe IRA
2222-2222

Jane Doe Trust
3333-3333

Jack Doe UTMA
4444-4444

Jane Doe ROTH IRA
5555-5555

Cancel Share

- 4 After selecting **Share**, a confirmation window will display affirming that an e-mail has been sent to the trusted individual inviting them to view the shared accounts. The account holder is responsible for contacting the trusted individual in a manner that they deem secure to provide the **6-digit access code** that is displayed in the confirmation window. The trusted individual will be required to enter this code when accepting the sharing invite. The trusted individual will have 14 days to accept the sharing invite before it is automatically revoked. Select **Done** to complete the sharing process.

Share Account

An invitation has been sent to John Doe at johndoe@stifel.com with a link to accept your shared account(s).

In order to protect your account information, John Doe must enter the following 6 digit access code when prompted before viewing your shared account(s).

224-836

You may tell John Doe this access code in person or your preferred method of contact.

This code will expire in 14 days.

Done

How to Share Accounts

5 On the Sharing tab under Account Settings, Stifel account holders can monitor the account(s) they have shared with trusted individuals and the status of sharing invitations. At any point, select **Edit** to modify the name/relationship of the trusted individual. Select **Revoke Access** to remove sharing access to the account(s).

Select **Get Access Code** to view the 6-digit access code and note the number of days until it expires.

The screenshot shows the Stifel Wealth Tracker interface. The left sidebar contains navigation options: Home, Portfolio, Research & News, Manage Accounts, My Financial Advisor, My Documents, Account Settings (highlighted), Settings, Important Information, and Log Off. The main content area is titled 'Account Settings' and has two tabs: 'Sharing' (selected) and 'Nicknames'. Below the tabs, there is an 'Account Sharing' section with a brief explanation and a 'Share Accounts' button. The 'Accounts Shared By User' section contains a table with the following data:

Shared With	Accounts Shared	Status	Actions
John Doe	Jane Doe 1111-1111	(PENDING) Get Access Code	Edit Revoke Access

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