

## **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.





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

Refore granting access for an individual to view your account(s) lefts understand what it means to share an account		
te Verse Branking access for an information to new your account(s), iet's understand what it means to share an account.		
n Your Control	milli member atternori accorntant or other trusted	
idividual. At any time, you may add or remove accounts the ccess to view your accounts altogether.	nat a particular individual can view or revoke an individual's	
View-Only Access		
Sharing your account grants that individual view-only access. This allows trusted individuals visibility to your finances, while keeping your accounts safe.		
View-Only Access		
🗸 Individuals Can:	😢 Individuals Cannot:	
View your account balances, holdings, tax details,	<ul> <li>Make changes to your account</li> </ul>	
<ul> <li>Mew and download documents including</li> </ul>	Adjust Stifel Wealth Tracker preferences     Perform any trades or transactions	
statements, confirms, and tax forms	Share your account with another individual	
nvitations		
Sharing your account is a two-step process in order to keep your account safe and secure. First, you will provide us some basic information so that we can automatically send an invitation link via e-mail. Second, we will provide you a unique access code that you will need to give to the individual you wish to share with.		
Once that individual has both the invitation link and access code, he or she can accept your invitation and begin using Stifel Wealth Tracker to view your shared accounts.		
Do not show this message again	Cancel	



## **How to Share Accounts**

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	My Accounts 5 Accounts		
	- Mobile Number	✓ Jane Doe 1111-1111 ✓ Jane Doe IRA 2222-2222		
	John Doe	Jane Doe Trust 3333-3333		
	Relationship Optional	✓ Jack Dog OTWA 4444-4444 ✓ Jane Doe ROTH IRA 5555-5555		
	Cancel	Share		

4

3

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 indvidual 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 <b>14 days</b> .	
Done	



5

## **How to Share Accounts**

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.

STIFEL   WEALTH TRACKER	Welcome back, Jane Doe	
Home	Account Settings	
Portfolio	· · · · · · · · · · · · · · · · · · ·	
Research & News	Sharing Nicknames	
Manage Accounts	Account Sharing You can give permission for your family, accountant, or anyone of your choosing to view one or more of your accounts. Sharing an account grants them view-only access to your Stifel account(s) without allowing them to make changes, place trades, or transact on the account(s).	
My Financial Advisor		
My Documents		
Account Settings	Share Accounts •	
Settings	· · · · · · · · · · · · · · · · · · ·	
Important Information	Accounts Shared By User	
Log Off	Shared With Accounts Shared	
	John Doe Jane Doe (PENDING) 1111-1111 Get Access Code C Edit O 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

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