## FAITH TRACKER

## How to Share Accounts

STIFEL   WEALTH	Welcome back, Good Marning, Valued Clien Loss Jagin 2007/2025 or 1.35 Pil			
Home	Account Settings			
Move Money	<pre>v</pre>			
Bank with Stifel	Sharing Nicknames Quicken			
Manage Stifel Cards	Account Sharing			
Research & News	Account Sharing You can give remission for your family, accountant, or anyone of your choosing to access one or more of your accounts. Sharing an account grants your trutted individual access to your Stifel or Stifel Bank account, to enable them to stay up to date on the details of the account).			
Manage Accounts				
My Financial Advisor	Share Accounts +			
Document Center				
Settings				
Profile				
Account Settings				
Account Settings				

Navigate to **Settings** and select **Account Settings**. Then choose **Share Accounts** from the Sharing tab.

hare Account		
fore granting access for an individual to view your acco	unt(s), let's understand what it means to share an account.	
Your Control		
ou may want to share one or all of your accounts with a individual. At any time, you may add or nemove accounts i ccess to view your accounts altogether.	family member, attorney, accountant, or other trusted that a particular individual can view or revoke an individual's	2
/iew-Only Access		
sharing your account grants that individual view-only accounts safe.	ess. This allows trusted individuals visibility to your finances.	
View-0	Only Access	1
🕗 Individuals Can:	O Individuals Cannot:	
View your account balances, holdings, tax details,	<ul> <li>Make changes to your account</li> </ul>	
<ul> <li>and transactions</li> <li>View and download documents, including</li> </ul>	<ul> <li>Adjust Stifel Wealth Tracker preferences</li> <li>Perform any trades or transactions</li> </ul>	
statements, confirms, and tax forms	Share your account with another individual	
nvitations		
	rp your account safe and secure. First, you will provide us	
ome basic information so that we can automatically seno inique access code that you will need to give to the indivi-	I an invitation link via e-mail. Second. we will provide you a dual you wish to share with.	
Ince that individual has both the invitation link and acces	s code, he or she can accept your invitation and begin using	

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

Enter the E-Mail Address, Mobile Number, and 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.



After selecting Share, a confirmation window will appear confirming that the trusted individual has been sent an invitation to view the shared accounts.

Contact the trusted individual in a manner that deems secure to provide the 6-digit access code displayed in the confirmation window. The trusted individual must enter this code when accepting the sharing invite and will have 14 days to accept the sharing invite before it is automatically revoked.

Select **Done** to complete the sharing process.

## Shared Accounts

9:25 ৵	
Accounts Shared By	User
,	
Shared With	Trusted Person
	(PENDING)
	Get Access Code
Accounts Shared	Stifel Financial
	XXXX-XXXX
🕼 Edit	Revoke Access
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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.

## **Questions?**

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

Monday – Friday 5:00 a.m. – 8:00 p.m. Central

Saturday – Sunday 5:00 a.m. – 6:00 p.m. Central



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