

Enrollment Guide

1 Navigate to www.stifelwealthtracker.com and select **Sign Up**.



2 Complete the enrollment fields by indicating client status, creating a username, password, and providing contact information.

Please Note: The e-mail address and phone number will require validation later in the enrollment process.

If yes:

If no:

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- 3 Complete the **additional enrollment fields** including:
- Stifel Account Number
 - Date of Birth
 - Social Security Number

The screenshot shows the 'Verify Stifel Account' form. At the top, there are three tabs: 'Personal Info', 'Account Info', and 'Verification'. The 'Account Info' tab is active. Below the tabs, the title 'Verify Stifel Account' is displayed with a help icon. A message states: 'We need a little more information to verify your identity in order to access your Stifel Accounts information. This process will distinguish you from our other Stifel clients so remember to enter your Account Number, Date of Birth and Social Security Number.' There are three input fields: 'Stifel Account Number' with the value '0000-0000', 'Date of Birth' with the value '01/01/1960', and 'Social Security Number' with the value '000-12-1234'. At the bottom right, there are two buttons: 'Go Back' and 'Continue', with the 'Continue' button highlighted by a red box.

- 4 A series of questions will be asked to authenticate. Please choose the correct answer per question and select **Continue**.

The screenshot shows the 'Verify Stifel Account' form. At the top, there are three tabs: 'Personal Info', 'Account Info', and 'Verification'. The 'Verification' tab is active. Below the tabs, the title 'Verify Stifel Account' is displayed with a help icon. A question asks: 'Which of the following corporations have you ever been associated with?'. There are five radio button options: 'Garden Hills No 2 Owners Association', 'Medical Logistics', 'Solarking', 'Temptronic', and 'None of the above'. At the bottom right, there are two buttons: 'Go Back' and 'Continue', with the 'Continue' button highlighted by a red box.

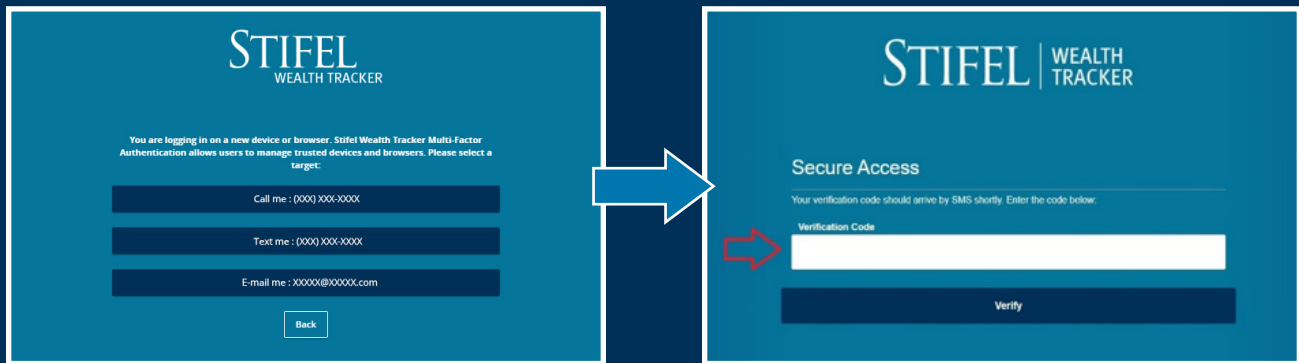
- 5 Once the required questions have been successfully completed, the below message will appear. Select **Continue** to proceed.

The screenshot shows the 'Verify Stifel Account' form. At the top, there are three tabs: 'Personal Info', 'Account Info', and 'Verification'. The 'Verification' tab is active. Below the tabs, the title 'Verify Stifel Account' is displayed with a help icon. A large green checkmark is centered on the screen, with the text 'Account Verified' above it. At the bottom right, there are two buttons: 'Go Back' and 'Continue', with the 'Continue' button highlighted by a red box.

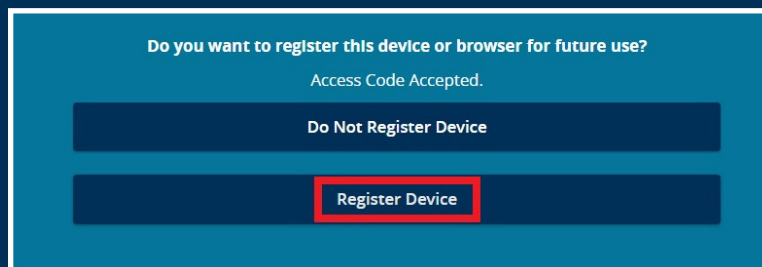
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- 6 To verify that a valid e-mail address, home phone, or mobile phone number have been entered, there will be a prompt to verify the information with a Secure Access Code. Choose the method of delivery, enter the Secure Access Code delivered via phone call, text, or e-mail, and then select **Verify**.

Please Note: Stifel’s electronic document delivery feature requires a validated e-mail address. Please choose to verify the e-mail address if electronic delivery settings will be changed upon first login.



- 7 After successful validation, a user agreement will display. Please read carefully and select **“I Accept”** if you agree and wish to continue.
- 8 Future logins may require device verification, prompting you to provide a Secure Access Code delivered via text or e-mail. To avoid this step, select **Register Device**.



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