STIFEL WEALTH TRACKER

Enrollment Guide



You will receive a prompt to verify your e-mail address, home phone, or mobile phone number with a Secure Access Code. Choose the method of delivery, enter the Secure Access Code delivered via phone call, text, or e-mail, then select **Verify**.

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



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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**.

Do you want to register this device or browser for future use? Access Code Accepted. Do Not Register Device

Register Device

After successful validation, a user agreement will display. Please read carefully and select "I Accept" if you agree and wish to continue.



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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