Client eWealthManager Registration Process

New User Guide

- The email invitation is a system-generated email sent from advisornotification@ewealthmanager.com
- This invitation is valid for only 21 days
- Account number is required to complete registration

SELECT THE "CLICK HERE" HYPERLINK TO BEGIN REGISTRATION

From: Client Notification At eWealthManager.com [mailto:advisornotification@ewealthmanager.com]
To: Valued Client
Subject: Receive Online Access to Your Investment Account Information
Importance: High

On behalf of your financial advisor, Valued Financial Advisor, you are invited to take advantage of expanded web-based tools that allow you to securely access account details and other resources related to your investment portfolio.

To take advantage of these exciting online features, please click here to complete the registration process.

Sign up for eDelivery
Once you're online you can sign up for electronic document delivery. eDelivery gives you convenient, paperless access to 2+ years of account statements and other important documents.

If you have any questions or need help logging in, please contact your Financial Advisor, Valued Financial Advisor, at (800) 555-2289.

If you're having trouble accessing the link, please paste the following URL in your browser:

https://www.ewealthmanager.com/UnifiedLogin/Registration?InvitationId=270032&InvitationChallenge=312688387

Thank you.

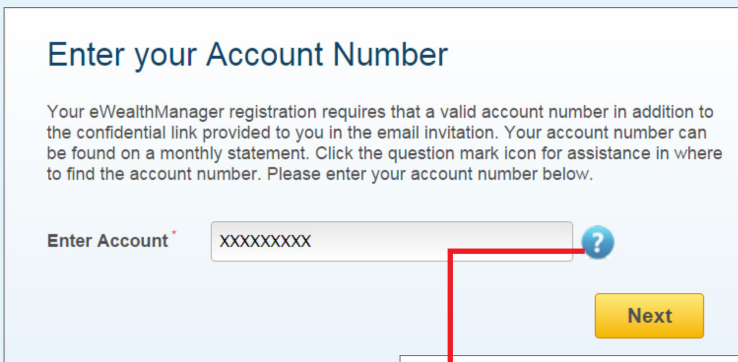
NEW USERS

Step 1. New users will select NO

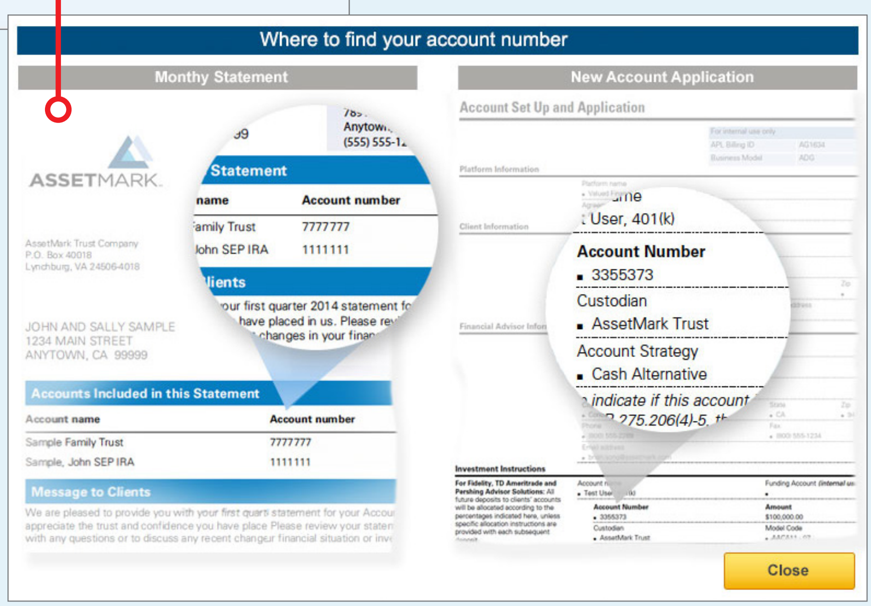
Selecting "Yes" takes user to a page to enter an account number, then to enter login credentials; the new accounts will be associated with the login.

Selecting "Don't Know" takes user to a page to enter email address; if the Username is on file, then Username recovery email will be sent to the email on file.

Step 2. Enter your account number and click NEXT



The account number is also available on the Account Establishment Documents



Step 3. **Enter your information on the registration form and click NEXT**

New User Registration Form

First Name *

Preferred Name/Nickname

Middle Name

Last Name *

Phone *

Email *

Valid email address is required to proceed. Example: name@example.com

Next

Step 4. **Enter a username and click NEXT**

New User Registration Form

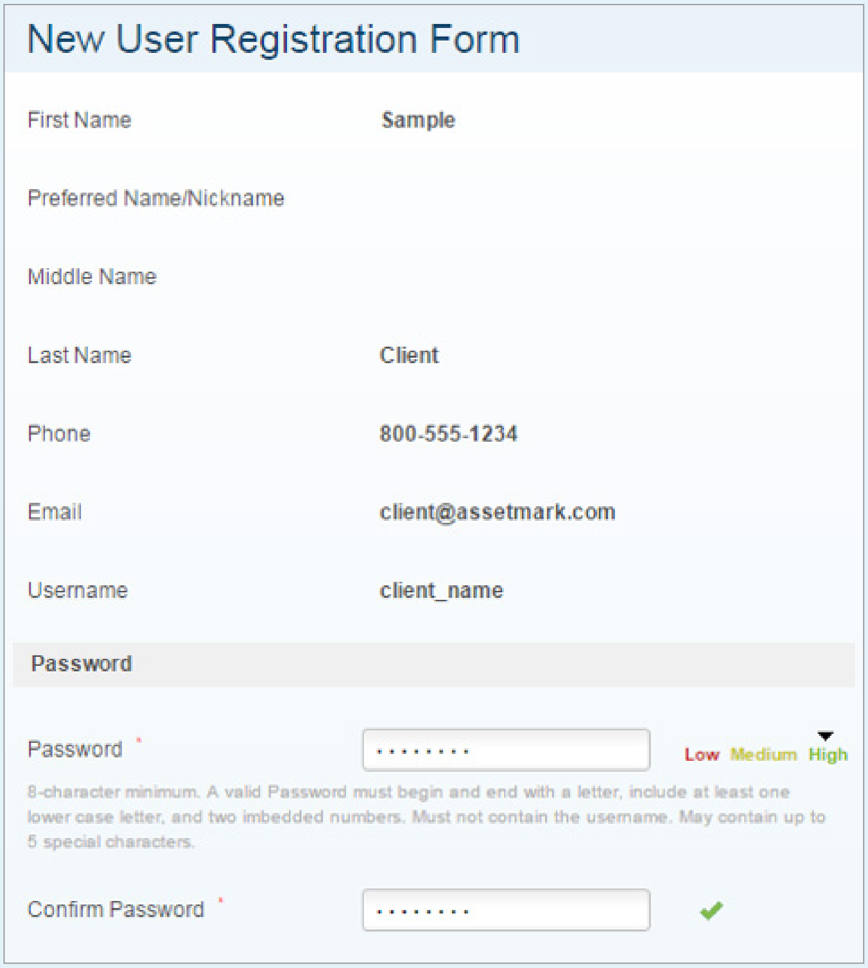
First Name	**Sample**
Preferred Name/Nickname	
Middle Name	
Last Name	**Client**
Phone	**800-555-1234**
Email	**client@assetmark.com**
Username *	

Usernames must be between 6 to 30 characters. Usernames may not be an Advisor ID, Agent ID, or Broker Dealer ID (e.g., AG####). Usernames may contain numbers (0-9), an @ symbol, a period (.), a hyphen (-), or an underscore (_).

Back Next

Usernames must be between 6 and 30 characters, and are not case-sensitive. Usernames may contain numbers (0-9), an @ symbol, a period (.), a hyphen (-), or an underscore (_).

Step 5. Enter a password and confirm the password


New User Registration Form

First Name	Sample
Preferred Name/Nickname	
Middle Name	
Last Name	Client
Phone	800-555-1234
Email	client@assetmark.com
Username	client_name

Password

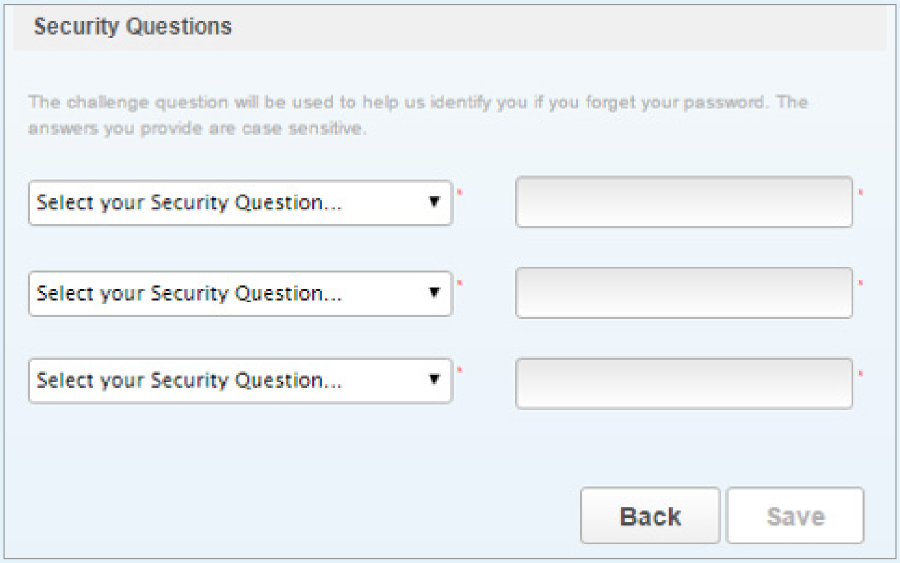
Password * .... Low Medium High

8-character minimum. A valid Password must begin and end with a letter, include at least one lower case letter, and two imbedded numbers. Must not contain the username. May contain up to 5 special characters.

Confirm Password * ....

Password is a minimum of 8 characters and is case-sensitive. Must begin and end with a letter, include at least one lower-case letter and two embedded numbers. Must not contain the username. May contain up to 5 special characters.

Step 6. Select 3 security questions from the drop down menus and provide answers to those questions



Security answers are case-sensitive.

Step 7. Click SAVE

Upon successful completion, the user will receive the following confirmation and will be given an opportunity to access the website by selecting LOGIN EWEALTHMANAGER

Users set up with eDelivery preferences will be prompted to accept the Terms and Conditions and will have the option to change their delivery preferences.

AssetMark, Inc.

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