

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

Do you currently use eWealthManager?

Yes Don't Know **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

Enter your Account Number

Your eWealthManager registration requires that a valid account number in addition to the confidential link provided to you in the email invitation. Your account number can be found on a monthly statement. Click the question mark icon for assistance in where to find the account number. Please enter your account number below.

Enter Account ?

Next

The account number is also available on the Account Establishment Documents

Where to find your account number

Monthly Statement

705... Anytown, CA (555) 555-1234

ASSETMARK

AssetMark Trust Company
P.O. Box 40018
Lynchburg, VA 24006-4018

JOHN AND SALLY SAMPLE
1234 MAIN STREET
ANYTOWN, CA 99999

Account name	Account number
Sample Family Trust	7777777
Sample, John SEP IRA	1111111

Message to Clients

We are pleased to provide you with your first quarter statement for your Account. We appreciate the trust and confidence you have placed in us. Please review your statement with any questions or to discuss any recent changes in your financial situation or investment objectives.

New Account Application

Account Set Up and Application

End Internal use only:
APL Billing ID: AD1634
Business Model: ADG

Platform Information

Platform name: eWealth Manager
Agent: [redacted]

Client Information

Client Name: [redacted] User, 401(k)

Financial Advisor Information

Account Number: 3355373
Custodian: AssetMark Trust
Account Strategy: Cash Alternative

Investment Instructions

For Fidelity, TD Ameritrade and Pershing Advisor Solutions: All future deposits to client accounts will be allocated according to the percentages indicated here, unless specific allocation instructions are provided with each subsequent investment.

Account Number: 3355373
Amount: \$100,000.00
Custodian: AssetMark Trust
Model Code: AEM711-07

Funding Account (Internal use only): [redacted]

Close

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 Questions

The challenge question will be used to help us identify you if you forget your password. The answers you provide are case sensitive.

Select your Security Question...

Select your Security Question...

Select your Security Question...

Back **Save**

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

eWealthManager

Congratulations!

Congratulations! You have successfully completed the registration process. Please click on the button below to access your account.

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.