eWealthManager

New User Setup

Activate Your Online Access

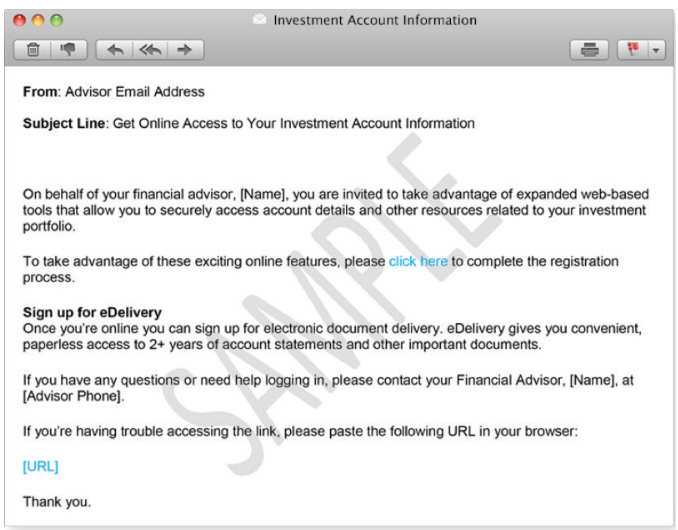
Securely access your account information and documents online through ewealthmanager.com.

What you need to get started:

- Activation email
- Account number

Step 1: Click the link in your activation email

Lost your invite? Contact your financial advisor to send you a new one


Investment Account Information

From: Advisor Email Address

Subject Line: Get Online Access to Your Investment Account Information

On behalf of your financial advisor, [Name], 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, [Name], at [Advisor Phone].

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

[URL]

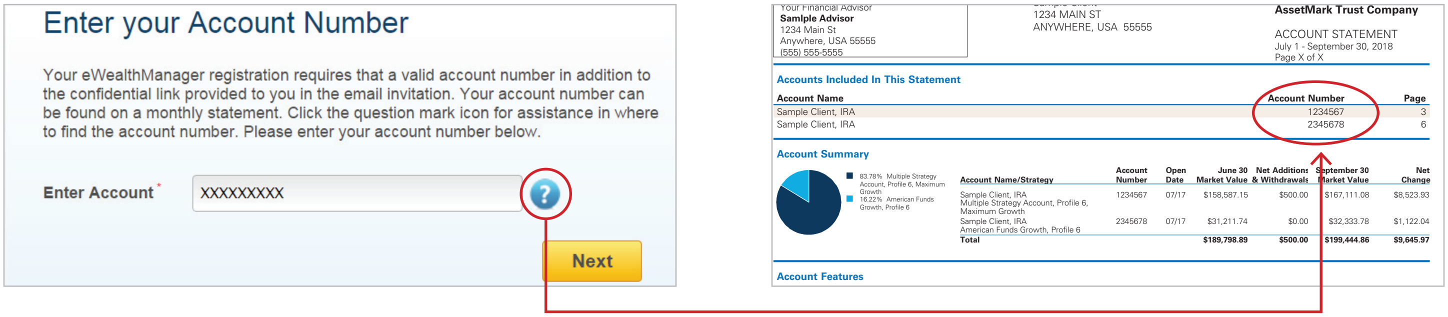
Thank you.

SAMPLE

Step 2: Select NO, when asked if you currently use eWealthManager

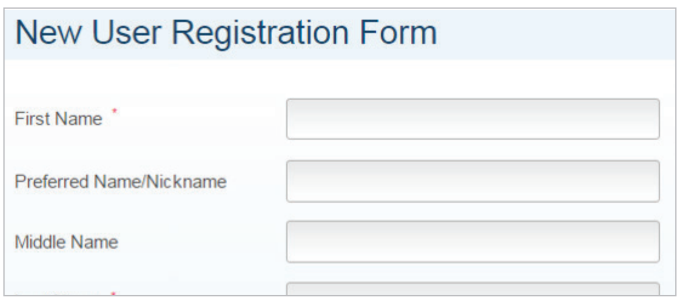
Step 3: Verify it's you using your account number

To obtain your account number, contact your financial advisor or look for it on your account paperwork or AssetMark statement.



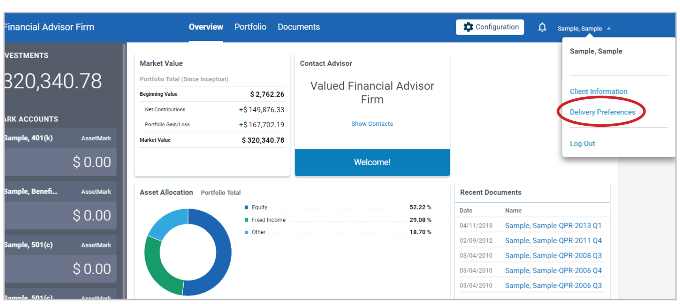
Step 4: Profile Setup and Log In

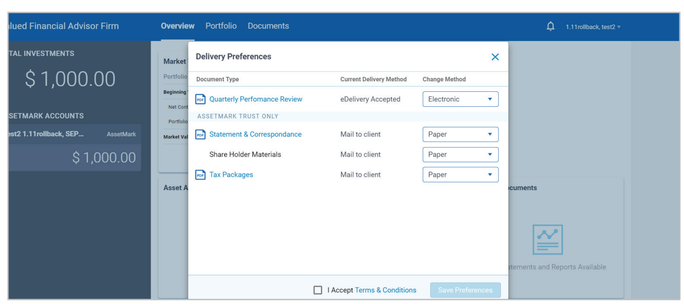
Enter your profile information, create a username and password, and set up your security questions.



Step 5: Confirm Delivery Preferences

Select **Delivery Preferences** under your profile to confirm your email address and elect electronic delivery (eDelivery) for statements and other documents.





With eDelivery, you'll get secure, 24/7 access to your documents the moment they're available—and you can change your delivery settings at any time.