

New User Setup

Activate Your Online Access

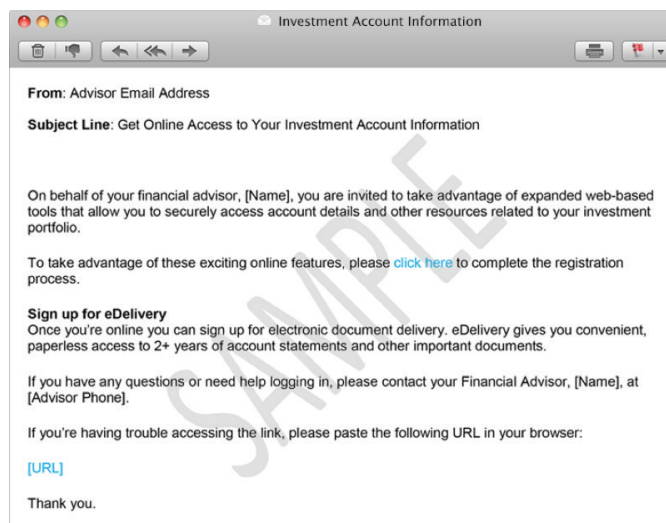
Securely access your account information and documents online through ewealthmanager.com.

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



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.

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](#)

Accounts Included In This Statement	
Account Name	Account Number 1234567 2345678
Sample Client, IRA	3
Sample Client, IRA	6

Account Summary					
Account Name/Strategy	Account Number	Open Date	June 30 Market Value & Withdrawals	September 30 Market Value	Net Change
Sample Client, IRA Multiple Strategy Account, Profile 6, Maximum Growth	1234567	07/17	\$158,587.15 \$500.00	\$167,111.08	\$8,523.93
Sample Client, IRA American Funds Growth, Profile 6	2345678	07/17	\$31,211.74 \$0.00	\$32,333.78	\$1,122.04
Total			\$189,798.89 \$500.00	\$199,444.86	\$9,645.97

Step 4: Profile Setup and Log In

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

New User Registration Form

First Name*

Preferred Name/Nickname

Middle Name



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.

The screenshot shows the client dashboard with a navigation menu at the top. The 'Delivery Preferences' option is highlighted with a red circle. The dashboard also displays market value, asset allocation, and recent documents.

The screenshot shows the 'Delivery Preferences' configuration screen. It allows users to select document types (e.g., Quarterly Performance Review, Statement & Correspondence, Share Holder Materials, Tax Packages) and choose the current delivery method (eDelivery Accepted) and change method (Electronic, Paper).

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.