CAMBRIDGE

Wealthscape Investor New User Registration and Paperless Sign-up Guide

Table of Contents

New User Registration – User Created

Wealthscape Investor New User Registration

The Wealthscape Investor℠ new user registration function allows you to register for access to Wealthscape Investor on your own. After registering, you will be able to access your brokerage account online and have the option to go paperless by signing up for e-notification. In order to register for Wealthscape Investor, you must have an active brokerage account with Fidelity Clearing & Custody Solutions℠ (FCCS) and have a Social Security number (SSN).

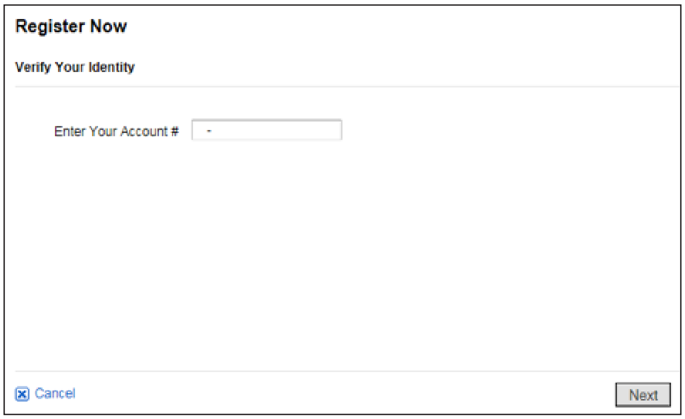
After registering, you will have access to all accounts on which you are listed as a holder. If you open new accounts, they will automatically be linked to your investor ID. All account holders listed on joint or trust accounts will have the ability to register for Wealthscape Investor access.

How to Register for a Wealthscape Investor ID

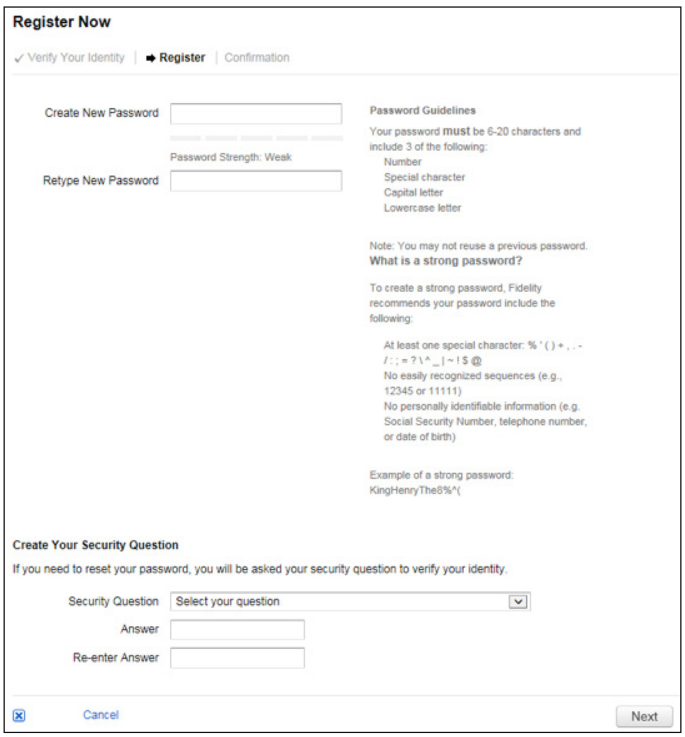
- Go to wealthscapeinvestor.com/cir. Click the **Register** link on the Login Page.

- Enter the last four digits of your SSN, your first and last name, your date of birth, and click **Next**

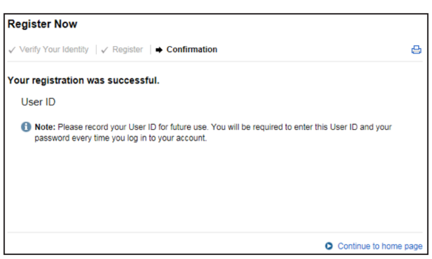
- Enter the account number you wish to access and click **Next**



- Create and verify your new password
- Select a security question and type your answer in the box below. Then, re-enter your answer and click **Next.**



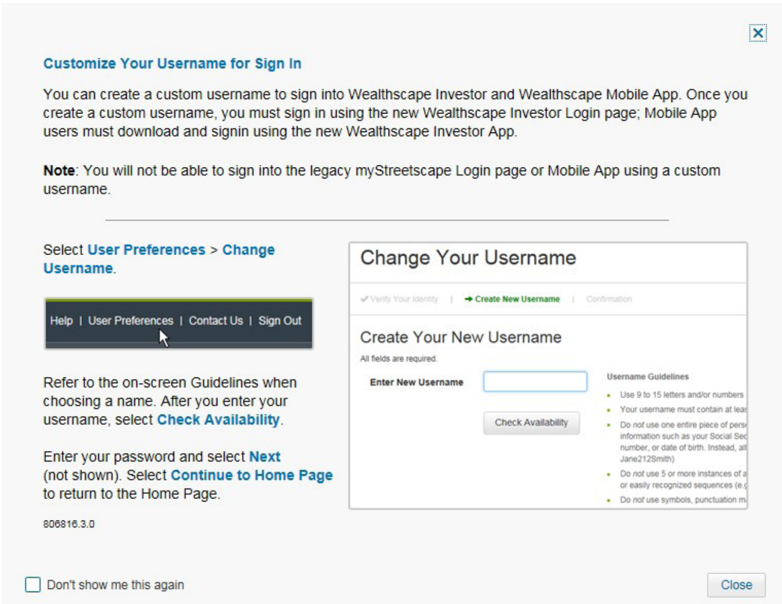
- The confirmation window will display when your registration was successful



- Print the confirmation page by clicking the **Print** icon
- Click **Continue to home page** to proceed directly to the page that contains all your account information

Customize Your Username for Sign In

You can create a custom username to sign into Wealthscape Investor and the Wealthscape Mobile App. Once you create a custom username, you must sign in using the new Wealthscape Investor login you created.



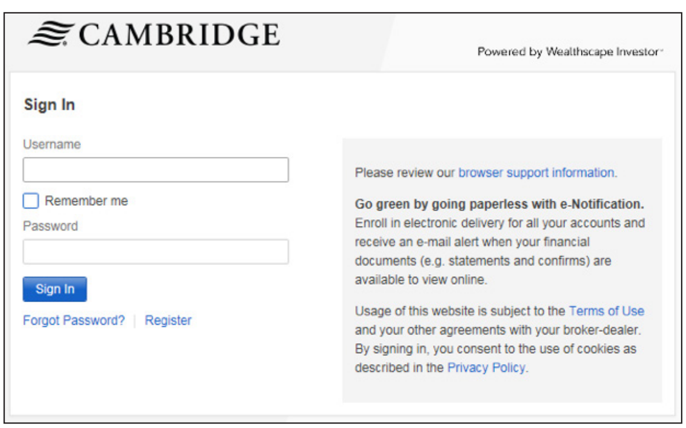
New User Registration – Cambridge Created

If you wish to have Cambridge complete your new user registration for Wealthscape Investor, please contact your advisor who will fill out a Wealthscape Investor Authorization Form.

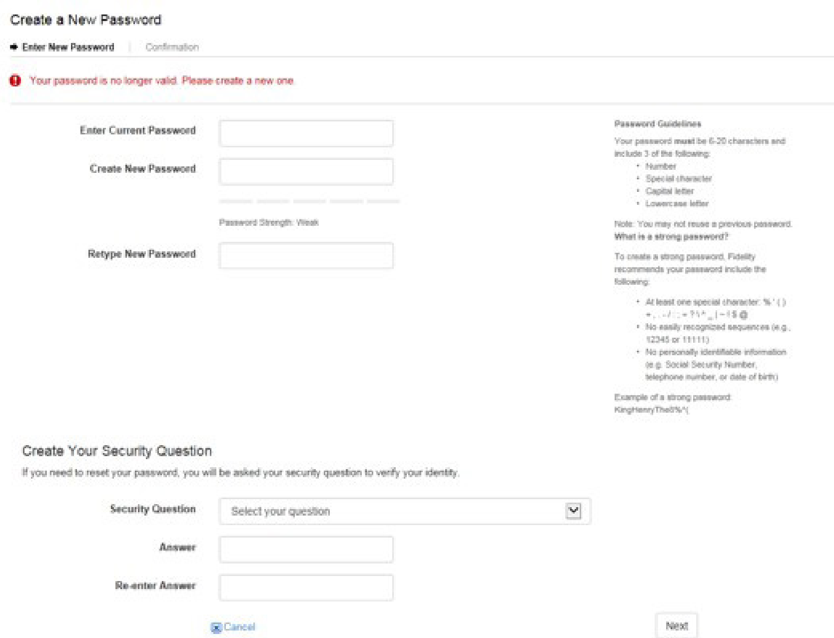
Once your user registration is created, Cambridge will email your username and password to your advisor who will be responsible for emailing that information to you. Once registered, you will be able to access your brokerage account online and have the option to go paperless by signing up for e-notification. In order to register for Wealthscape Investor, you must have an active brokerage account with FCCS and have a SSN.

Log In

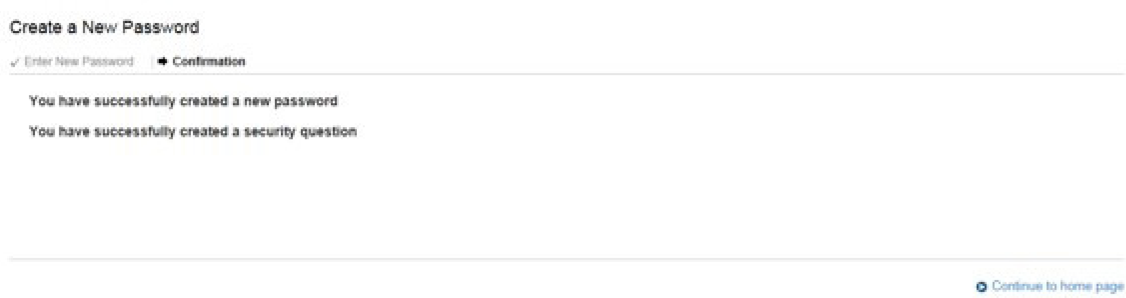
Go to wealthscapeinvestor.com/cir and enter your username and password that was provided by your advisor and click **Sign In.**



You will be prompted to create a new custom password and select a security question.

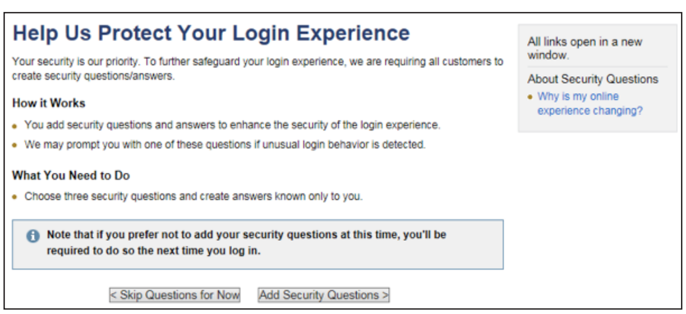


The confirmation page will display when your password and security question have been set up successfully. Click **Continue to home page**.

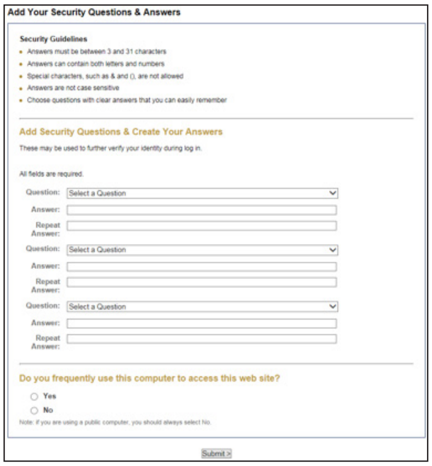


Additional Security Questions

Once logged in, you will be prompted to enter additional security questions for your username. Click **Add Security Questions.** If you click **Skip Questions for Now,** the next time you log in, you will be required to add the additional security questions.



After you have selected your security questions and provided your answers, click **Submit**



Add Your Security Questions & Answers

Security Guidelines

- Answers must be between 3 and 31 characters
- Answers can contain both letters and numbers
- Special characters, such as & and (), are not allowed
- Answers are not case sensitive
- Choose questions with clear answers that you can easily remember

Add Security Questions & Create Your Answers

These may be used to further verify your identity during log in.

All fields are required.

Question: Select a Question
Answer:
Repeat Answer:
Question: Select a Question
Answer:
Repeat Answer:
Question: Select a Question
Answer:
Repeat Answer:

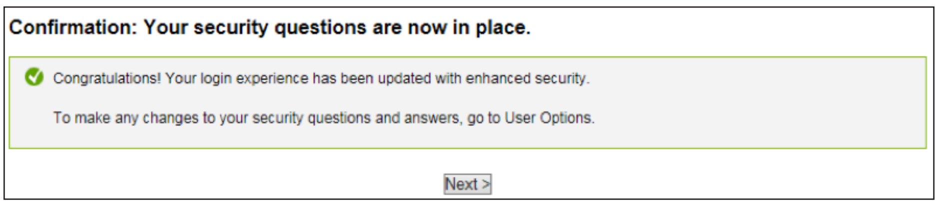
Do you frequently use this computer to access this web site?

Yes
No

Note: if you are using a public computer, you should always select No.

Submit >

The confirmation window will display when your security questions were successful, click **Next**



Confirmation: Your security questions are now in place.

Congratulations! Your login experience has been updated with enhanced security.

To make any changes to your security questions and answers, go to User Options.

Next >

The user agreement will appear after completing your security questions. Once you have read the terms, click **Accept** at the bottom of the screen.

Terms of Use > User Agreement

END-USER AGREEMENT

1. Cambridge Investment Research , hereby grants you a nonexclusive, nontransferable license for the term of this Agreement to access and use, Company Internet-based securities trading service, as may be amended from time to time (the "Product"). The Product is available through the World Wide Web protocol of the Internet, and allows you to obtain information concerning your brokerage account with Company, enter orders in such account to buy and sell certain securities, stock options and mutual funds, and obtain quotations and other information (some of which may be provided by third parties). You agree not to assign, sublicense or otherwise convey or transfer your rights under this Agreement to another person or entity. Though orders are usually routed to the marketplace within seconds, certain orders, at Company's sole discretion, may be subject to manual review and entry, which may cause delays in the processing of your orders. You also understand that you will receive the price at which your order executes in the marketplace, which may be different from the price at which the security or option is trading when your order is entered into the Product. When you place a request to cancel an order, the cancellation of that order is not guaranteed. Your order will only be canceled if your request is received in the marketplace and matched up with your order before your order executes. Market orders are subject to immediate execution. During market hours, it is rarely possible to cancel your market order. Please do not assume that any order has been executed or canceled until you have received a transaction confirmation from Company. Also, please be aware that Company, from time to time, receives late reports from exchanges and market makers reporting the status of transactions. Accordingly, you will be subject to late reports related to orders that were previously unreported to you or reported to you as being expired, canceled, or executed. In addition, any reporting or posting errors, including errors in execution prices, will be corrected to reflect what actually occurred in the marketplace.

2. You shall be the only authorized user of the Product under this Agreement. Data, information and services accessible through the Product may be displayed, reformatted and printed for your personal, noncommercial use only. You agree to keep confidential and not cause or permit such data, information or services to be published, broadcast, retransmitted, reproduced, commercially exploited or otherwise re- disseminated. You agree not to create any derivative works (including databases) based on the Product or any data, information or services contained therein.

3. You understand that all the terms and conditions of your Customer Account Agreement with Company and Company's Agreement with its clearing agent, National Financial Services Corporation ("Licensor"), including margin and options agreements, if applicable and any applicable prospectus, control the operation of your account hereunder and those terms and conditions are incorporated herein by reference. You acknowledge the Product may involve the transmission to you of information that may be considered personal financial information, including but not limited to the identity and number of shares that you trade and the net dollar price for the shares. You acknowledge that Company cannot assure the security of electronic transmission of such information over the Internet. You consent to the transmission by electronic means of such information through the Product, such consent shall be effective at all times that you use the Product.

4. Your use of the Product requires your receipt from Company and use of a unique identification number ("ID") and associated password ("Password"). You hereby agree to maintain your ID and Password in strict confidence. You understand that you shall be solely responsible for all orders entered through the Product using your ID and Password. Company may at all times rely upon and act in accordance with any instructions or inquiries, whether written, oral, electronic, or otherwise. All instructions communicated to us using your ID and Password will be considered to have been sent by you. Due to the nature of the Internet, the limited security mechanisms associated with the Product and the inherent limitations of such mechanisms, Company cannot ensure the privacy, security or authenticity of your communications with the Product. Accordingly, you must assess whether the use of the Product or the Internet is adequately secure to meet your particular needs. Further information on this topic may be obtained from Company. The use and storage of any information, including without limitation, the ID, the Password, portfolio information, transaction activity, account balances, and any other information or orders available on your personal computer, is at your own risk and is your sole responsibility. You are responsible for providing and maintaining the communications equipment (including personal computers and modems) and telephone or alternative services required for accessing and using the Product and for all communications service fees and charges incurred by you in accessing the Product.

Verify Your Identity/Security Enhancements

Once logged in, it will prompt you to verify your identity. Input the last four digits of your SSN, first name, last name, and date of birth, then click **Submit**.

Verify Your Identity

Complete this verification form if you are one of the account owners. If you are not an account owner click here.

Last 4 Digits of Your SSN

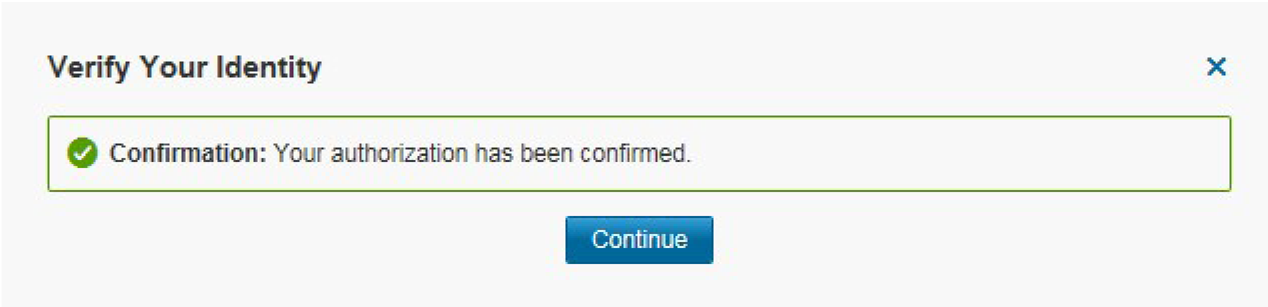
First Name

Last Name

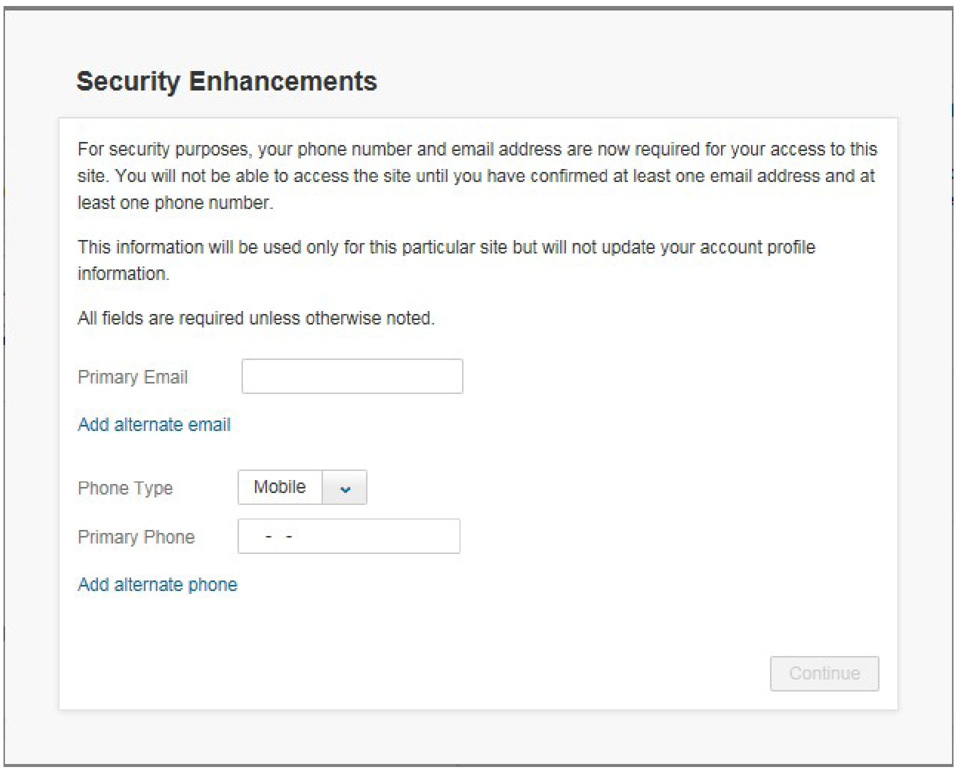
Date of Birth mm/dd/yyyy

submit

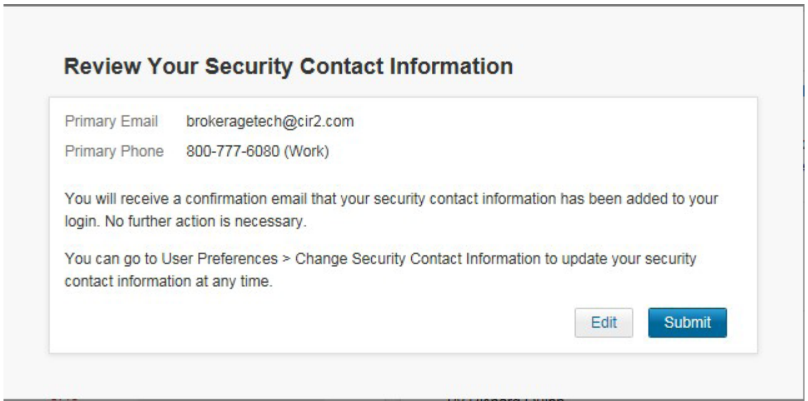
The confirmation page will display once your identity has been verified.



You will be prompted to input security enhancement information. This information will be your primary email and phone number, which must be entered in order to continue to the Wealthscape Investor site.
Click **continue**.

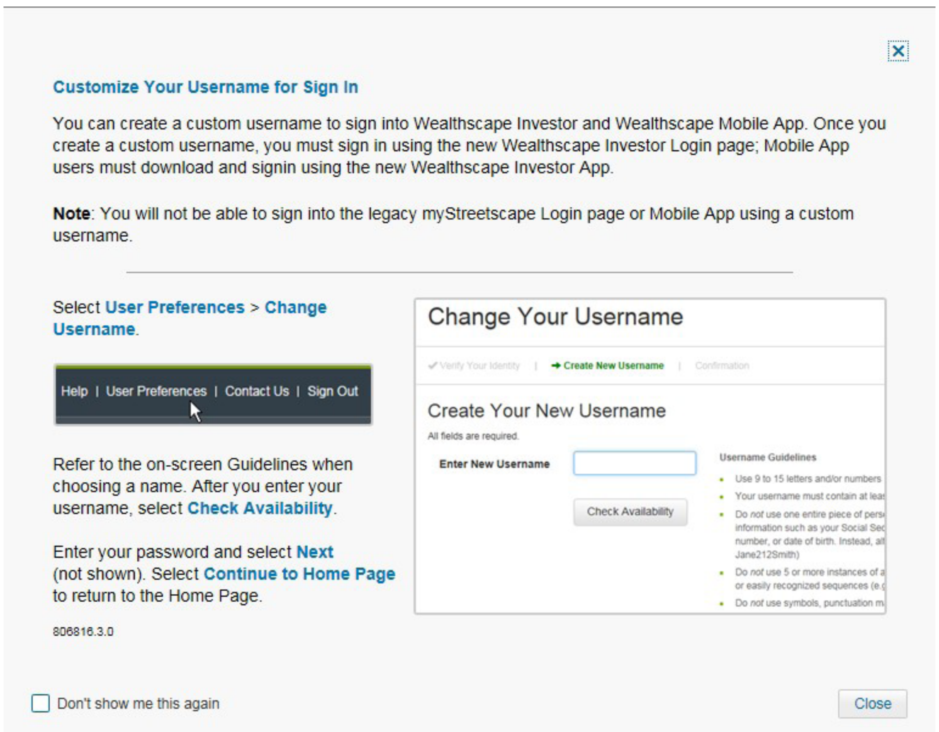


Once the security enhancement information has been accepted, click **Submit**.

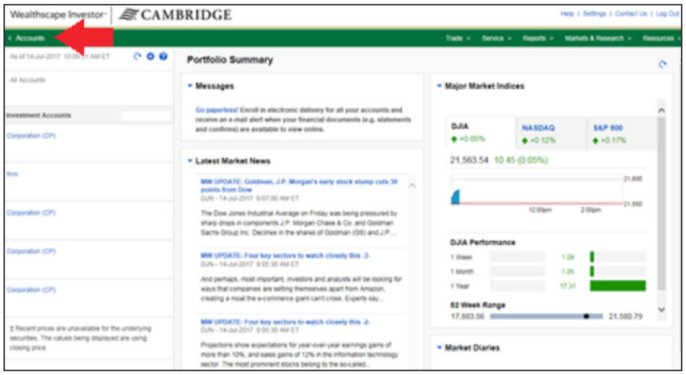


Customize Your Username for Sign In

You can create a custom username to sign into Wealthscape Investor and the Wealthscape Mobile App. Once you create a custom username, you must sign in using the new Wealthscape Investor login you created.



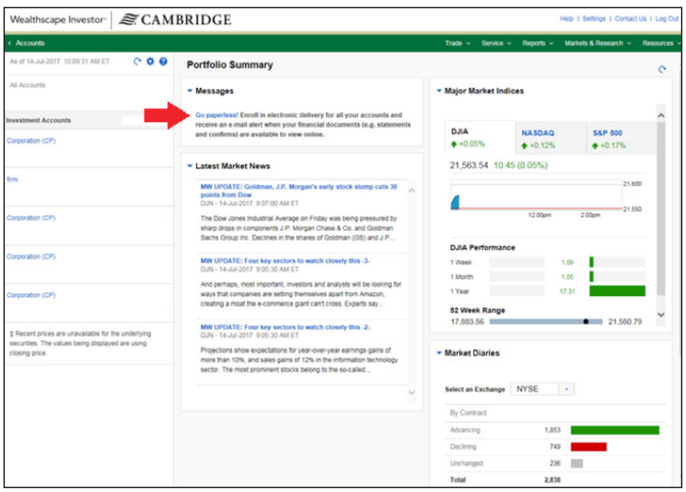
Your Wealthscape Investor account homepage will appear. To view your accounts, click **Accounts** in the top left corner of the screen. On the Accounts page, you will find a general overview of each account associated with your username.



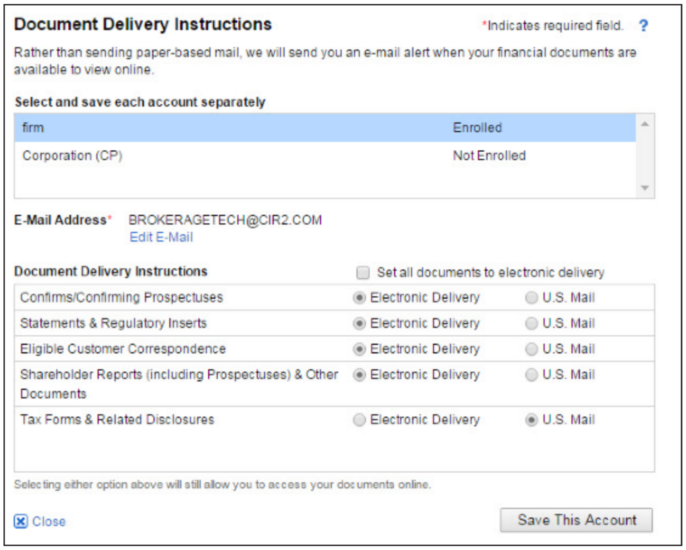
Go Paperless

You can enroll in electronic delivery (eDelivery) for all accounts. Wealthscape Investor will send an email alert when financial documents (e.g., statements and confirmations) are available to view online.

To sign up for paperless options, click **Go paperless!**

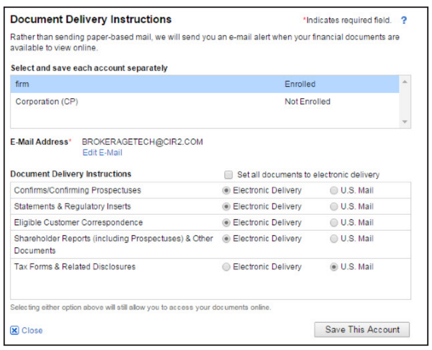


Under Document Delivery Instructions, select the circle next to **Electronic Delivery** for each account you would like eDelivery setup with. If you wish to setup eDelivery for all account, select the box next to **Set all documents to electronic delivery.** Once you have selected your options, click **Save This Account.**

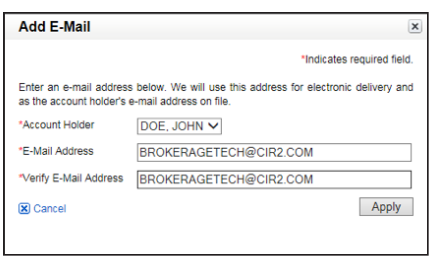


Add or Edit Email Address

On the same screen, if you wish to add or edit your email address, click **Edit E-Mail.**

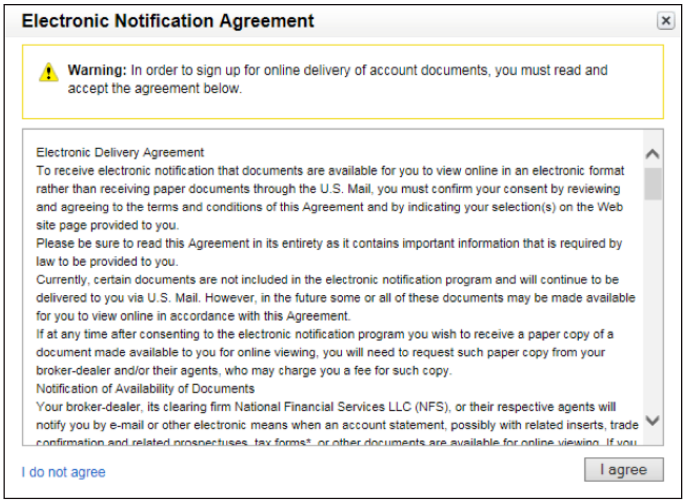


Enter your email address in both boxes and click **Apply** in the bottom right corner of your screen. The box will disappear, bringing you back to the Document Delivery Instructions box.



Electronic Notification Agreement

Per SEC regulations, a client must give informed consent to stop the mailing of paper statements and confirmations. Due to these regulations, the client must read and accept the license agreement.



After accepting the Electronic Notification Agreement, you will return to the main page. Please confirm that your settings are correct.

You are now set up to receive eDelivery. You will receive electronic email notifications which will include a link or URL where the document(s) can be accessed, viewed, and printed. You will be provided with instructions on how to access the documents.

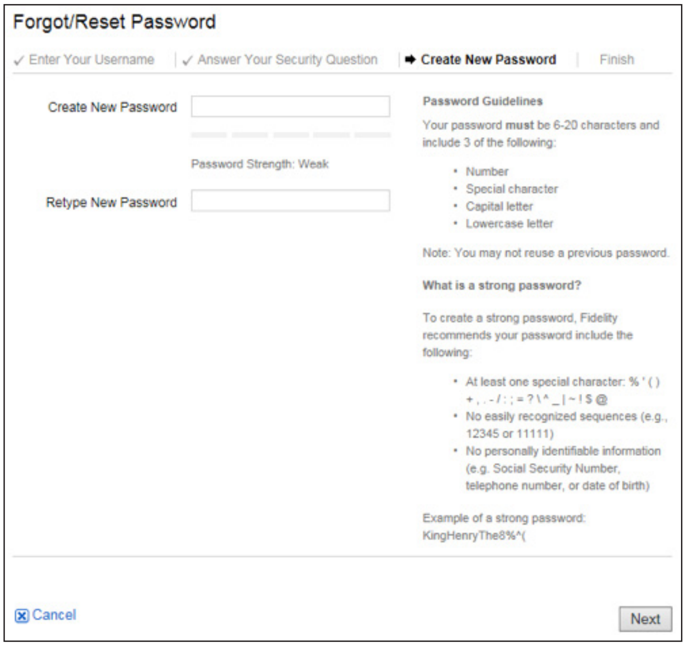
Forgot/Reset Password

If you have forgotten your password or wish to reset your password, visit wealthscapeinvestor.com/cir and click **Forgot Password?**

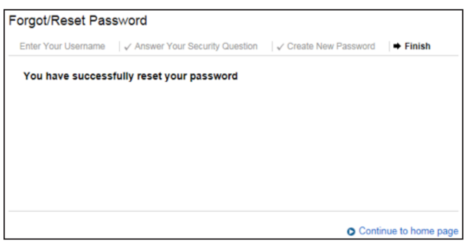
Enter your username and click **Next.**

Answer your security question and click **Next.**

Create and verify your new password and click **Next.**



The confirmation window will display when your new password was created successfully, click **Continue to home page.**



If you have questions, please contact your advisor.

CAMBRIDGE

1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080

*Please note: If you do not sign up for paperless statements, they will be delivered to you via U.S. Mail. You will need to complete the same steps for all of your accounts. If at anytime after consenting to the electronic notification program you wish to receive a paper copy of a document made available to you for online viewing, you will need to request the paper copy from Cambridge.