# eQuipt GUIDE

## **Your Custom Account Portal**

View your investment accounts online at <u>equipt.osaic.com/</u> or download the **Osaic eQuipt** mobile app on your iOS or Android device. Use this guide to learn how to sign up and navigate **eQuipt**.

# **Table of Contents**

eQuipt Features	.2
Sign Up	. 3
View Accounts on the Dashboard	. 6
View Accounts in Wealthscape <sup>sM</sup>	.7
Customize eDelivery Preferences	. 8
Access Communications	.9
Link Household Accounts1	11
View/Pay for Financial Planning Invoices1	12
Login Assistance1	13

# eQuipt Features

- View all your brokerage investment accounts through a single login:
  - Automatically view all accounts established under your Social Security number
  - Link and view additional accounts within your household
  - View important account information, including balances, holdings, activity, order statuses (as of close of business the previous day), and more
- Customize eDelivery preferences for account communications.
- Access account communications including statements, tax documents, and trade confirmations
- Pay for financial planning services via a bank account or credit/debit card.

# Sign Up

To sign up for **eQuipt**, follow the registration process below:

1. Go to <u>equipt.osaic.com</u> and click **Sign Up** on the login screen (shown below). In certain situations, your financial professional may send you a link that takes you directly to Step 2, (below).

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Login	
Enter your eQuipt cre	dentials
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Don't have an account? Sig	jn Up → <b>4</b>
What You Will Need	
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- 2. If you began your enrollment process by clicking an email link sent by your financial professional, you will be asked to provide your date of birth, last 4 digits of your Social Security number, and your zip code for verification. If you initiated the enrollment process yourself using the Sign-Up link mentioned in Step 1, you will be asked to provide your date of birth, last 4 digits of your Social Security number, your zip code, and any one of your Osaic account numbers for verification. Click Next to continue.
- 3. Complete the identity verification process:
  - The first prompt will display the phone number(s) on file for you.
  - Select the number to which you want the security code sent (if only one number is on file it will be preselected). Then select **Send Passcode via Text** or **Call Me With My Passcode**.

		eQuipt	
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We will need to ser	d you a Onetime Passcode in or	der to verify your identity. Plea method.	ase select a phone number and delivery
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	Mobile	****) - *** - 7777	
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	Cal	I Me With My Passcode	

• Next, you'll receive a security code via text message or phone call (generally within a few seconds).



• Once you receive the passcode on your device, input the passcode and click **Verify Passcode** to continue. For security purposes, you may also be asked to complete this process as part of future logins. 4. Review your phone number(s) and email address(es) for accuracy. You can edit or delete any incorrect entries or add new entries as needed. Click **Everything Looks Right** when complete.

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5. Lastly, create a username and password, mark the checkbox to agree to the terms described, and click **Next**. Your enrollment process is complete. Remember to add <u>equipt.osaic.com/</u> to your browser's Favorites list!

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01 VERIFY YOUR ACCOUNT	02 AUTHENTICATE YOUR IDENTITY	03 CONTACT INFORMATION	04 REGISTER
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### **View Accounts on the Dashboard**

After logging into **eQuipt**, the first screen you'll see is the Dashboard. (NOTE: the top left of the screen shows you are in the eQuipt tab and Dashboard sub-tab.) From here you can view your portfolio as of the previous business day's market close, including:

- Account values
- Top 5 holdings (Select "Show More" to view your top 10 holdings)
- Five most recent account activities (Select "Show More" to view your 10 most recent activities)
- Overall asset allocation

	EALTHSCAPE					
SHBOARD	TASKS NOTICE	S SETTINGS				
ASSET SUMM	ARY =		ACCOUNT DETAI	LS		
	Tot	tal Market Value	REGISTRATION	ACCOUNT	NUMBER	MARKET VALUE
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			Individual SAGEPOINT FINANC	14L	JP000005	8,684.23
ASSET CLASS	MARKET VALUE	PERCENTAGE	Individual SAGEPOINT TEST FINAN	<u>0</u>	5V000005	0.00
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Cash	4,441.77	21.65%	SAGEPOINT TEST FINAN			
RECENT ACTI	VITY SYMBOL / CUSIP	NET AMOUNT	TOP HOLDINGS	QUANTITY	PRICE	MARKET VALUE
08/07/2020	ISHARES TR 1-3 YR 464287457	0.25	AIGI PER980007 INSURED DEPOSIT P	3,648.37	1.00	3,648.37
08/03/2020	PIMCO DYNAMIC BOND 72201M487	2.58	DCUSX	251.28	9.99	2,510.31
08/03/2020	PIMCO GLOBAL BOND	0.06	DWS CROCI U.S. FUN D			
07/31/2020	SPDR S&P 500 ETF TR	5.46	FVADX 355148503 FRANKLIN SMALL-CA P V	38.94	45.81	1,783.75
07/28/2020	78462F103 IVY SECURIAN CORE 465897775 Show More	1.23	PFIUX 72201M487 PIMCO DYNAMIC BO ND F	130.96	10.69	1,399.99
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			n			

### View Accounts in Wealthscape<sup>s™</sup>

For detailed information about each of your investment accounts, follow these steps:

1. Access the **Wealthscape** tab. Wealthscape will launch in a separate browser tab.

	eQuipt					
EQUIPT WEALTHSCAPE						
DASHBOARD TAL S	NOTICES SETTINGS					
ASSET SUMMARY		ACCOUNT DETAILS				
ASSET SUMMARY		ACCOUNT DETAILS	MARKET VALUE			

- 2. Select the account you'd like to view by clicking its **Details** link in the Accounts sidebar on the left.
- 3. Use the tabs and sub-tabs along the top of the screen to navigate between the various pages of information (e.g., Positions, Balances, Activity & Orders, Documents, etc.).
- 4. You can show/hide the Accounts sidebar by clicking the Accounts icon in the top left.

0	pen/Unrealized   Wealthscape   🗙	+							~ -		×
← -	<ul> <li>C</li></ul>										
We	Wealthscape Investor* 🔿 Home = Menu 🗸 😝 User Options 📑 Sign Out										
Accounts	4 counts	× *	Individual (I) 5UP	000009							
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Markets Research	Portfolio 4 Accounts	\$28,698.78 Day Chg: \$0.00	Account Positions (C Group By None	pen/Unrealized) for 5UP Search By S	-000009: 3 Position(s)		A	s of 26-Jan-2022 1:32	36 PM ET 🔸	⊜ x 4	¢?
Cuote	<ul> <li>Investment Accounts</li> <li>2 Accounts</li> </ul>	\$9,084.20	Security ID	ADVISOR GROU	Closing Quantity 2,122.480	Recent Q 2,122.4	Recent Price \$1.00000°P \$72.04500	Recent Market Value \$2,122.48 \$7 204.50	Account Type Cash		
marks	Individual (I)	Day Cng: \$0.00	SENCX -	TOUCHSTONE L	19.370	19.370	\$54.75000°P	\$1,060.50 \$10,387.48	Cash		
	5UP-000006	\$1,399.97‡ Day Chg 2									
	Uniform Transfer to Minors Act 5UP-000007	(UTMA) Details \$7,584.23‡ Day Chg: \$0.00									

### **Customize eDelivery Preferences**

As an account holder, you will receive communications about your account(s) including statements, trade confirmations, disclosures, tax documents, and more. You can choose whether to receive these communications in paper or electronically.

**NOTE**: when you initially sign up for **eQuipt**, you are enrolled in electronic delivery for all communications *except* statements and tax documents. You can change these settings at any time via the process described below.

#### **Paper Delivery**

If you select paper delivery, communications will be mailed to your address of record and a PDF version will also be available in **eQuipt.** Depending on account type, fees may apply for paper delivery of trade confirmations (please speak to your financial professional for more information).

#### **Electronic Delivery (eDelivery)**

If you select eDelivery, you will receive an email notification when a communication is available to view in **eQuipt** as a PDF.

To edit your eDelivery settings, complete the steps below (see screenshots on next page):

- 1. In the eQuipt tab, select Settings.
- 2. Select eDelivery Preferences on the left.
- The "Osaic Documents" section enables you to set your eDelivery preferences for Disclosures & Policies and Firm Correspondence (hover over each category for a description).
- 4. The "NFS Documents" section shows the eDelivery settings for each of your NFS accounts. (NOTE: this section is only shown if you have active NFS accounts.) To change these settings, select **Edit All** in the top right.
- 5. A popup window will display where you can set your eDelivery preferences on an accountby-account basis. Select the account in the top half of the window, make your eDelivery selections in the bottom half of the window, then click "Save This Account" to apply your changes.

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	Settings applied to documents in this section will apply to all of th will include both your brokerage and non-brokerage accounts. DISCLOSURES & POLICIES Online Only FIRM CORRESPONDENCE Online Only	<ul> <li>Paper &amp; Online</li> <li>Paper &amp; Online</li> </ul>	are the primary authorized party and
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# **Access Communications**

Most account communications will be available in **eQuipt** and, depending on the type of communication, will either display in the **Notices** page or in the **Wealthscape Documents** page.

#### Notices

The Notices page provides access to the following types of communications:

- Account Disclosures
- Firm Correspondence:
  - Welcome Letter (sent when you open your first new account)
  - Address Change letters (sent when your address has been updated and when you open additional accounts)
  - Change Letters (sent when your financial or other information has been updated).
- Performance Reports (for fee-based advisory accounts)

To access Notice Communications:

- 1. Select the eQuipt tab.
- 2. Select the **Notices** sub-tab.
- 3. Select Disclosures & Policies, Firm Correspondence, or Performance from the options on the left
- 4. Within the selected tab, select the communication to view. You can filter the document list by account, date range, communication type, etc. then click **Apply Filters**.

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EQUIPT WEALTHSCAPE			
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	DATE▼ 6/30/2020 6/30/2020	DOCUMENT TYPE Form CBS Broker-Dealer Firm Brochure	

#### Wealthscape Documents

Account-level communications, such as statements, trade confirmations, and tax documents can be reviewed by accessing Wealthscape:

- 1. Click **Details** in the sidebar next to the account you want to view.
- 2. Click the **Documents** tab.
- 3. Select the type of document to view (Statements, Confirms, Tax Documents, or Correspondence).

Accounts       x         AS OF 25-JAN-2022 4:57:24 PM ET       Individual (I)       5UP-000009       Documents       Profile/Features       Cash Management         Ministis       Portfolio       Accounts       S20,703.03       Day Chg: +\$5.01 (+0.24%)       Statements       Confirms       Tax Documents       Correspondence         Ministis       Portfolio       Accounts       S20,703.03       Octatements & Rc       Gistatements of the previous 120 Months*.       Statements       Correspondence         Individual (I)       Day Chg: +\$5.01 (+0.24%)       Statements are available for the previous 120 Months*.       Statements       Statements and Notices (PDF)       II 2015 Statements         Individual (I)       Day Chg: +\$5.01 (+0.24%)       Day Chg: +\$5.01 (+0.24%)       Date       Statements and Notices (PDF)       II 2012 Statements         Individual (I)       Day Chg: +\$1.301 (+0.11%)       Day Chg: +\$1.301 (+0.11%)       Dol. PTE 12 2021       II 0nthilv / Quarterly Statement       II 2013 Statements         Individual (I)       Details       Day Chg: +\$1.301 (+0.11%)       Monthilv / Quarterly Statement       II 2012 Statements         Individual (I)       Details       Day Chg: +\$1.301 (+0.11%)       Day Chg: 14.301 (+0.11%)       II 2012 Statements       II 2013 Statements         Individual (II)       Day Chg: +\$1.301 (+0.11%)	We	Wealthscape Investor"								
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# **Link Household Accounts**

**eQuipt** provides you access to all brokerage accounts active under your Social Security number, using a single login. Brokerage accounts for other people in your household (spouse, children, etc.) can be linked to your login as well. NOTE: linked accounts will only display on the Dashboard, not in Wealthscape.

- 1. Click the **eQuipt** tab.
- 2. Select Settings.
- 3. Select Household Accounts.
- 4. Click Link Another Account. Next, you will be asked to provide the information about the account being linked including its *Account Number, Last 4 digits of Social Security number, Date of Birth*, and *Zip Code*. Once you have inputted this information, click the Link button.
- 5. If you ever need to unlink the account, click its trashcan icon

eQuipt				Logout
EQUIPT				
DASHBOARD TASKS	NOTICES	SETTINGS	2	
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	Personal Ac	counts (2)		
	SAM SMITH 123 MAIN STI	REET	Account # 036001188 Individual	
	<b>SAM SMITH</b> 123 MAIN STI	REET	Account # 036001196 Individual	

# **View/Pay Financial Planning Invoices**

If you receive financial planning or consulting services billed to you electronically, you will have an **Invoices** tab available within the eQuipt tab. (NOTE: this tab will not display if it is not applicable.) Use the **Invoices** tab and follow the onscreen prompts to easily pay via a bank account or credit/debit card.

		Logout			
EQUIPT	WEALTHSCAPE				
DASHBOARD	INVOICES	TASKS	NOTICES	SETTINGS	
Invoice	S				
CLIENT NAME	STATUS		AMOUNT	PAYMENT DUE	
John Clar	k 🦪 Out	standing	\$ 2,000.00	01/28/2022	Pay

### Login Assistance

If you forget your username or password, utilize the **Forgot Username** and **Forgot Password** links available on the login screen.

osaic	eQuipt	
Logi	n	
Enter your eQuip	t credentials	
Username	Forgot Username ?	
Password	Forgot Password?	

- Forgot Username: Input your email address and click Next to have the username emailed to you.
- **Forgot Password**: Provide your username and complete the security process, after which you will be able to set up a new password.
- Update your username, password, email address, and mobile number at any time in the eQuipt tab > Settings page by accessing the Account Details and Security Details screens:

	eQuipt	<b>(+</b> 10
EQUIPT WEALTHSCAPE	:	
ACCOUNT DETAILS	SECURITY DETAILS	
HOUSEHOLD ACCOUNTS E-DELIVERY PREFERENCES	You can update your security details here.	Ø
	Password ********	Ø

If you have any questions, please contact your financial professional.

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