

# FirstClearing

A trade name of Wells Fargo Clearing Services

## Enroll for Access Online

If you would like to have online or mobile access to your Advantage Program, IRA, or Investment (Brokerage) account:

1. Select the “Sign Up” link from your firm’s Access Online login screen.
2. Enter your account information and answer a few personal questions to verify your identity.
3. Once verified, enter the account numbers you would like to view online.
4. Create a user ID and password to access your accounts.
5. To complete your online enrollment, create three security questions and answers for future password resets.
6. Upon your initial login, you will be presented with an Online Agreement which will need to be reviewed and accepted only once.

For enrollment assistance, please contact Access Online Support at 1-877-488-3748, 24 hours a day, 7 days a week.

### Investment and Insurance Products:

▶ NOT FDIC Insured ▶ NO Bank Guarantee ▶ MAY Lose Value

The image displays two screenshots from the FirstClearing website. The top screenshot shows the 'Account Login' page with a 'Sign Up >' link. Below the login fields, there are links for 'Forgot Password >' and 'Forgot User ID >'. A progress bar indicates the enrollment steps: 1. Enter Information (highlighted), 2. Verification, 3. Accounts, and 4. Create User ID. The 'Online Enrollment' section is titled 'Enter Information' and prompts the user to provide details to create their user ID and password, noting that all fields are required. A 'First Name' input field is visible.

The bottom screenshot shows the 'Brokerage Overview' page. At the top, there are navigation links for 'Bill Pay', 'Trade', 'Get Quote Symbol or Co.', and 'Sign Off'. The main content area displays the account summary for 'D1'. The 'TOTAL VALUE' is \$2,036,049, and the 'TODAY'S CHANGE' is -\$81,591 (-3.01%). The 'Account Summary' table lists various account types and their values:

Account #	Securities Market Value	Today's Change	Cash & Cash Adj.	Margin Balance	Account Value
1234	\$95,789.40	+\$100.00	\$100,413.87	-\$90,021.76	\$186,282.49
5678		-\$1.00			
9101	\$2,030,462.00	-\$81,491.68	-\$743,998.79	\$1,100,000.00	\$1,877,463.71
9102		-\$1.00			
<b>On Total</b>	<b>\$2,028,249.40</b>	<b>-\$81,491.68</b>	<b>-\$643,584.92</b>	<b>\$1,637,222</b>	<b>\$2,026,048.20</b>

The 'Holdings Snapshot' section at the bottom shows the 'Asset Class' as 'Stocks' with a 'Market Value' of \$160,787.22 and a 'Today's Change' of +\$30,045 (+23.7%).

# Electronic Delivery of Account Documents

With Access Online, you can securely access up to seven years of account documents, such as Statements, Trade Confirmations and Tax Documents/1099s, as soon as they are created — before they reach your mailbox.

Go paperless and choose electronic delivery of account documents and shareholder communications:

1. Login to Access Online and in the Customer Service menu, select **Document Delivery Preferences** from the sub menu.
2. Choose ‘Electronic Delivery’ of all account documents, or check the boxes for the account documents you wish to have delivered electronically.
3. Select an email address to which a notification can be sent when a document is available to view online.
4. If you have chosen electronic delivery of Shareholder Communications, create a 4 digit PIN to use when voting your proxy shares online.
5. Click the Save button and review the **Disclosure Statement Regarding Electronic Delivery of Documents**. By accepting the disclosure statement, you will turn off paper delivery of your selected documents sent through the mail.

To view your account documents online, select **Statements & Docs** from the sub menu within the Portfolio menu.

For assistance, contact Access Online Support at 1-877-488-3748.

Account	Statements	Trade Confirms	Performance Reports	Tax Docs/1099s	Other Documents	Shareholder Communications
*****	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1091 (2011-2012)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>