Self-enrollment for Access Online
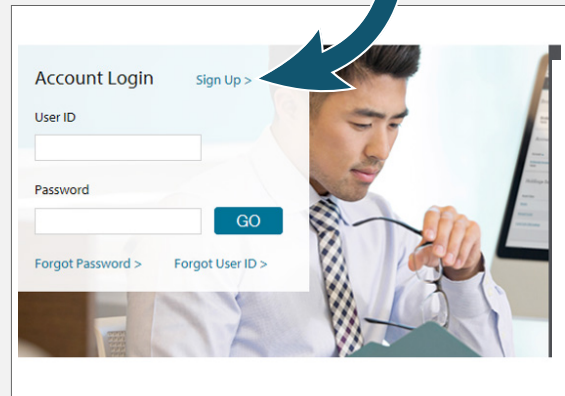
Go to:

https://tradepmr.fccaccessonline.com

 and select: **"Sign Up"**

(note the "s" in the "https://" prefix for this address)

_____

For enrollment assistance, please contact **Client Services Center** at 1-888-889-1401, available:
Monday - Friday (8am to 12am ET)
Saturday and Sunday (9am to 6pm ET)

1 *E*nter the following into the form:

- First Name
- Last Name
- 8-digit Account Number
- Date of Birth
- Social Security Number
- State
- Zip Code

Then click the "Next" button.

If you do not know your new account number, contact your Advisor.

2 For online security and account protection purposes, you will be asked multiple questions to verify your identity.

Once all questions are answered correctly, please hit the "Next" button.

If you answered incorrectly and cannot get access, call the Client Services Center at 1-888-889-1401 to establish access.

3 If you have more accounts you want to view online, add each account number individually on this screen.

To add an account, enter your 8-digit account number in the field, and hit the "Add account" button. If you do not know your new account number, contact your Financial Advisor.

Once all your account numbers have been entered, or if you have no additional accounts to add, click on the "Create UserID/ Password" button to continue.

 If you receive an error message that an *"account number you entered is not eligible for association with your UserID"* when trying to link an account to your online access, **call the Client Services Center at 1-888-889-1401.**

Enroll for Access Online

4

Create your User ID and password for your online account.

Click the "Help" button for more information and password requirements.

> To continue, click "Submit."

5

Once you hit "Submit" you should see a message on the screen telling you that "You have successfully created your User ID."

To continue, click "Login" at the bottom of the screen.

Login in using your new User ID and password, created in Step 4, and click "Go."

6

You will be asked to create three security questions.

You can pick a question from the dropdown list or create your own question by clicking the link.

Please note: all answers must be at least four characters (including spaces) and no two answers can match.

Answers are not case-sensitive.

7

You will be taken to a page that outlines the features of the new Access Online experience before going to the agreement. You can skip the tour by clicking "Get Started" at the top of the page.

Next, you will be taken to the online access agreement. After you have reviewed the online terms and conditions, you will need to check **all the boxes** for Online Access Agreement, NYSE, NASDAQ, and OPRA at the bottom of the screen.

Click on the Submit box to continue to your online account.

4

Please create a User I_ Password for online access to your accounts. A valid email address is also required.

User ID   Help▢
Password   _Help▢

Password   X
• 8 to 14 Characters
• Includes less than nine numbers
• No more than three repeating characters (aaa, 111, etc.)
• No more than three sequential numbers/letters (123, abc, etc.)
• Needs one of each:
   o Upper case letter
   o Lower case letter
   o Number
   o Special character (no semi-colons)
• Case-sensitive
• Can't contain spaces
• Can't be same as User ID
• Can't reuse any of the last six passwords

Confirm Password
Email Address   Help▢
Confirm Email Address

Back   Cancel   Submit

5

Online Enrollment

✓ You have su___f___ted your User ID.

Login

6

Enter Question and Answer #1   Create your own question

Question
Select a question...   ▼

Answer

7

Welcome to Access Online! Get Started ›

Here you'll find tools to help you manage your investments and reach your financial goals. Before you get started you'll need to accept the subscriber agreement.

7

1

Step 1: Agreement Acceptance

ONLINE ACCESS AGREEMENT

This _____ Online Access Agreement (the "Agreement") provides the terms and conditions of the Service.

Definitions.

For purposes of this Agreement, references to the following terms have the meanings set forth hereinbelow:

• "We," "us," and "our" means _____ and the broker-dealer firm which has introduced its Customer(s)' brokerage accounts to WFCS ("Introducing Firm") and any of its respective affiliates or direct or indirect subsidiaries, when any of them have established an Eligible Account or provided an Online Financial Service.
• "You" or "your" means, as applicable, each Owner of an Eligible Account, a person applying for an Eligible Account or a Delegate.
• "Authorized Representative" means a person with authority to take action or make decisions on behalf of another person with respect to an Eligible Account or an Online Financial Service, and includes any person who may (i) manage or administer an Eligible Account or an Online Financial Service, or (ii) authorize another person to access an Eligible Account or Online Financial Service.
• "Business Day" means Monday through Friday, excluding Saturday, Sunday and U.S. stock exchange holidays for brokerage accounts.

accept: ☐ **Online Access Agreement**   ☐ NYSE   ☐ NASDAQ   ☐ OPRA   Cancel   Submit