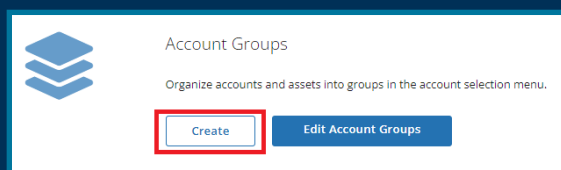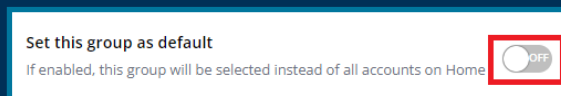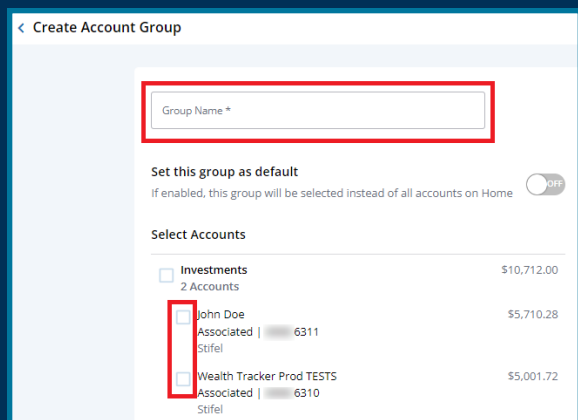# STIFEL
WEALTH TRACKER

Account Groups

Stifel Wealth Tracker gives Stifel clients the convenient ability to create groups to view accounts in the way that works best for them. Clients can also create a default group, which will allow them to set which group they would like to see upon login. Follow the instructions below to create an account group and/or default group.

1 Sign in to Stifel Wealth Tracker at **www.stifelwealthtracker.com**. Select **Manage Accounts** from the left-hand navigation menu, then select **Create** from the **Account Groups** option.
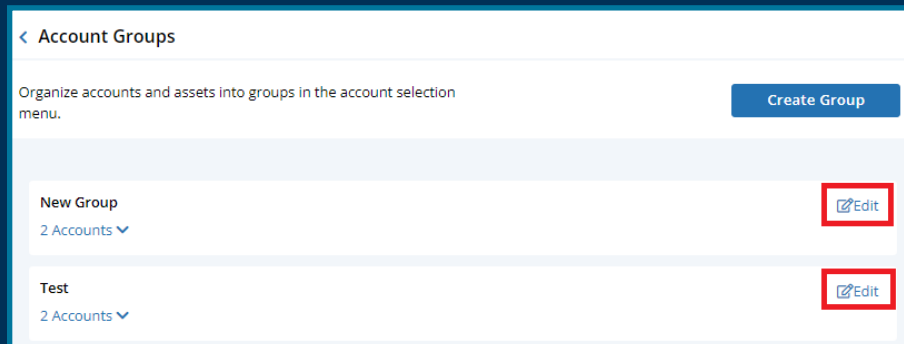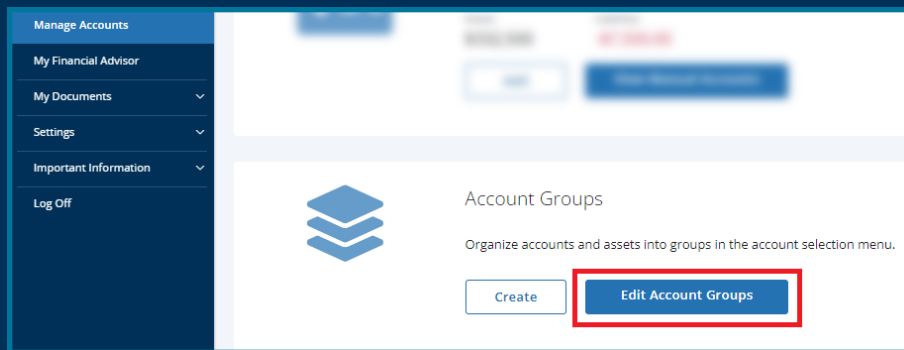

2 Create a **Group Name** and select the account(s) to be included in the group as indicated below. **Note:** To set this group as the **default** (if enabled, this group will be selected instead of all accounts on the home page), toggle the button shown below to select **ON**. Select **Save** at the bottom of the page when finished.

Account Groups

3 After successfully creating a group, the **Account Groups** page will load showing the new group and any existing groups.

4 To edit an existing Account Group, select **Edit Account Groups**.

Questions?

Contact Stifel Wealth Tracker at **(866) 697-8433** or **wealthtracker@stifel.com.**

Monday – Friday	**Saturday**
6:00 a.m. – 7:00 p.m. Central	7:30 a.m. – 4:00 p.m. Central

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