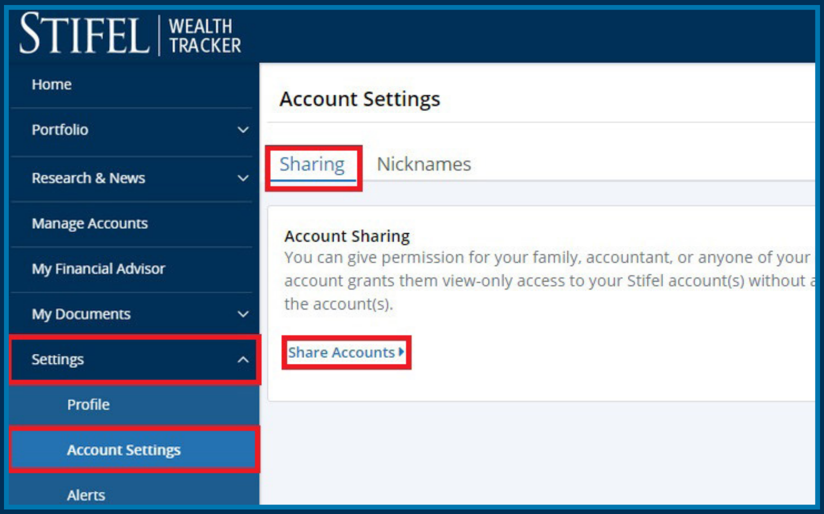
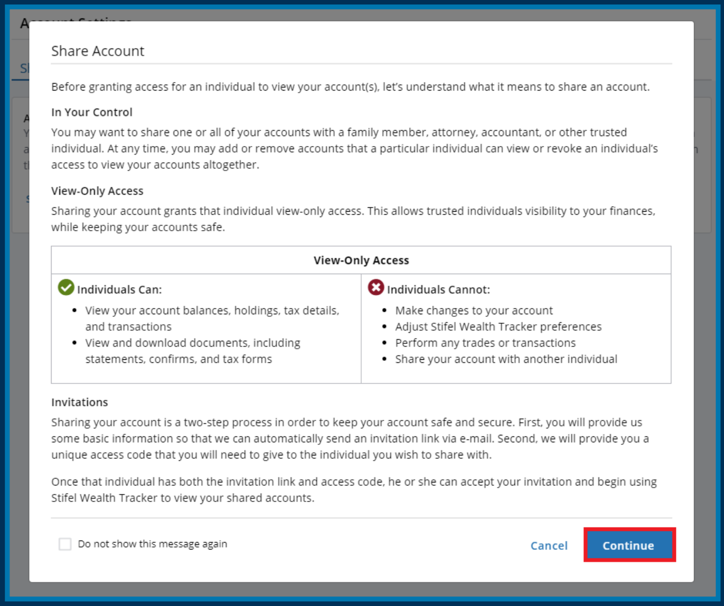
STIFEL
WEALTH TRACKER

How to Share Accounts

1. Sign in to Stifel Wealth Tracker at **www.stifelwealthtracker.com**. Select **Settings**, then **Account Settings** from the left-hand navigation menu, then select **Share Accounts** from the **Sharing** tab.



2. Carefully review the features of sharing your account; if you agree to the guidelines, select **Continue**.



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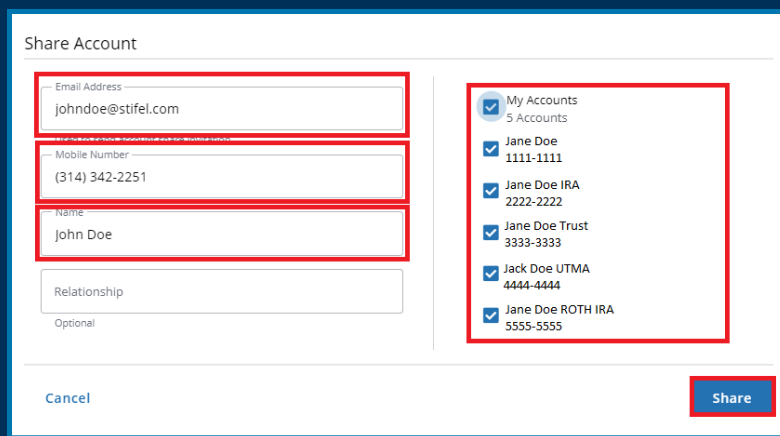
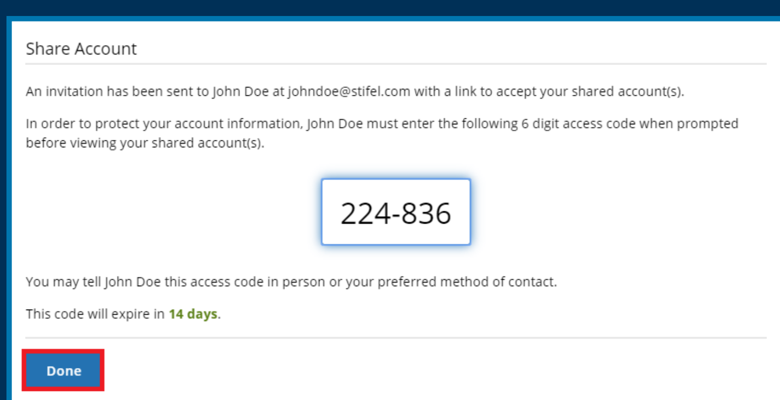
3 Complete the E-Mail Address, Mobile Number, and the Name of the trusted individual, and select the accounts to share from the list on the right. Select **Share** when finished. **Please Note:** Some accounts may not be eligible to share.



4 After selecting **Share**, a confirmation window will display affirming that an e-mail has been sent to the trusted individual inviting them to view the shared accounts. The account holder is responsible for contacting the trusted individual in a manner that they deem secure to provide the **6-digit access code** that is displayed in the confirmation window. The trusted individual will be required to enter this code when accepting the sharing invite. The trusted indvidual will have 14 days to accept the sharing invite before it is automatically revoked. Select **Done** to complete the sharing process.



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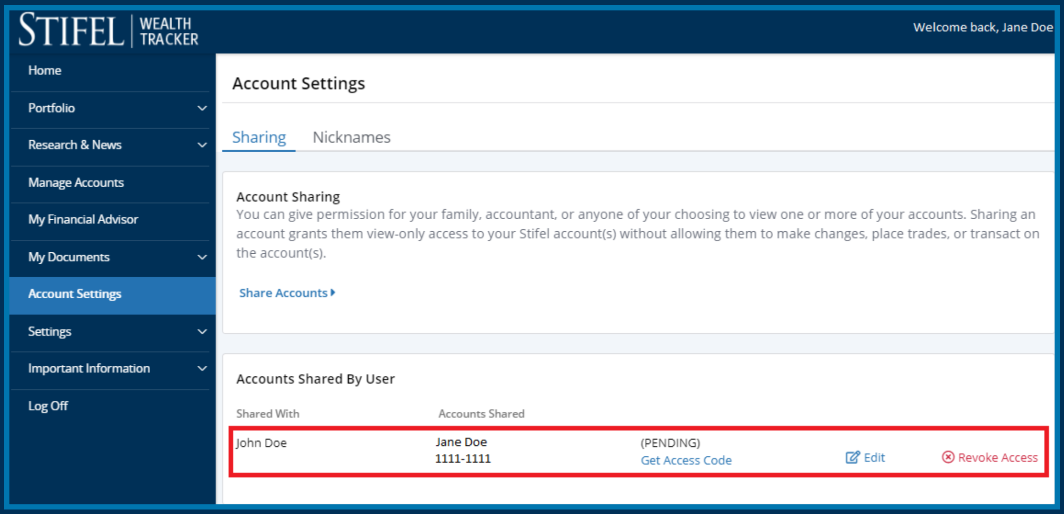
5 On the Sharing tab under Account Settings, Stifel account holders can monitor the account(s) they have shared with trusted individuals and the status of sharing invitations. At any point, select **Edit** to modify the name/relationship of the trusted individual. Select **Revoke Access** to remove sharing access to the account(s).

Select **Get Access Code** to view the 6-digit access code and note the number of days until it expires.



Questions?

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

Monday – Friday
6:00 a.m. – 7:00 p.m. Central

Saturday
7:30 a.m. – 4:00 p.m. Central