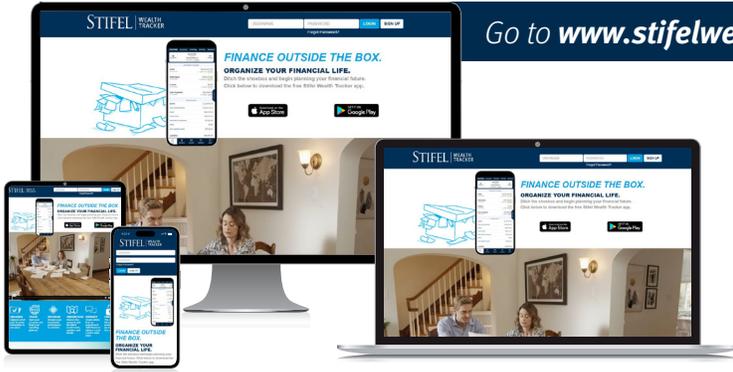


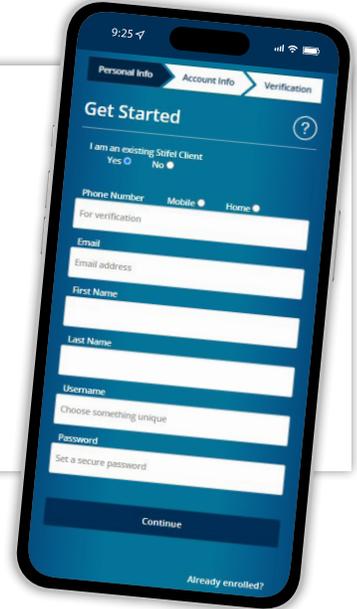
Go to www.stifelwealthtracker.com and select **Sign Up**.



1

Complete the enrollment fields by indicating client status, creating a username and password, and providing contact information.

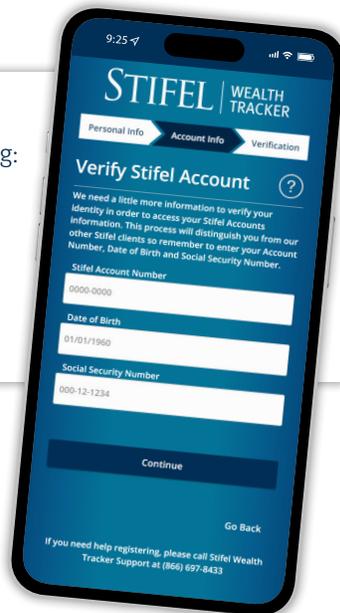
Please Note: Your e-mail address and phone number will require validation later on.



2

Complete the **additional enrollment fields**, including:

- Stifel account number
- Date of birth
- Social Security number



3

You'll be asked a series of authentication questions. Choose the correct answer for each question and select **Continue**.



4

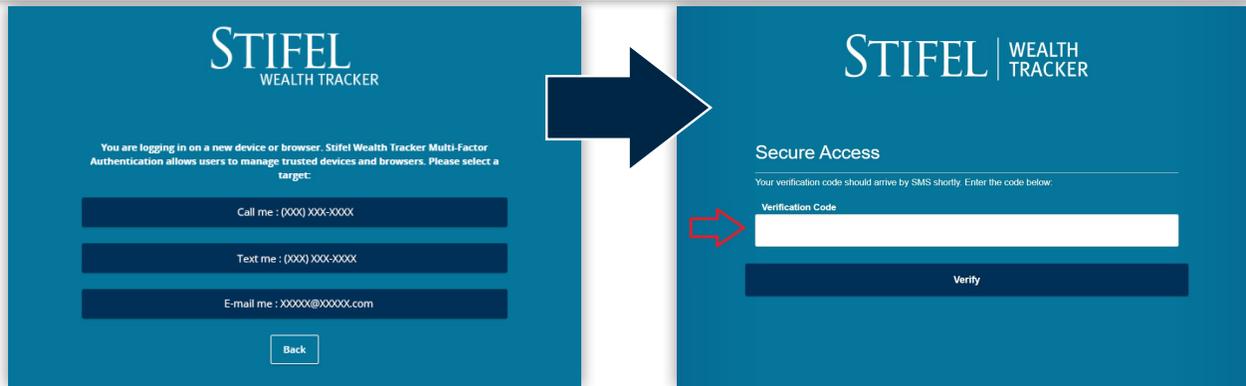
Once you've successfully answered the authentication questions, the below message will appear. Select **Continue** to proceed.



5

You will receive a prompt to verify your e-mail address, home phone, or mobile phone number with a Secure Access Code. Choose the method of delivery, enter the Secure Access Code delivered via phone call, text, or e-mail, then select **Verify**.

Please Note: Stifel’s electronic document delivery feature requires a verified e-mail address. Please choose to verify the e-mail address if electronic delivery settings will be changed upon first login.



6

Future logins may require device verification, prompting you to provide a Secure Access Code delivered via text or e-mail. To avoid this step, select **Register Device**.



7

After successful validation, a user agreement will display. Please read carefully and select “I Accept” if you agree and wish to continue.



Questions?

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

Monday – Friday
5:00 a.m. – 8:00 p.m. Central

Saturday
5:00 a.m. – 6:00 p.m. Central



Log In Now!
tracker.stifel.com