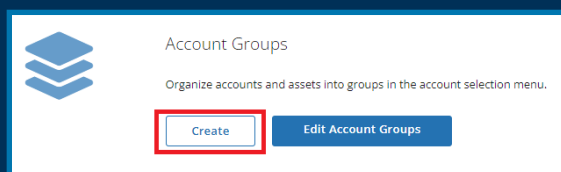


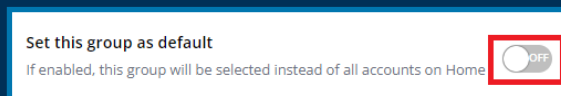
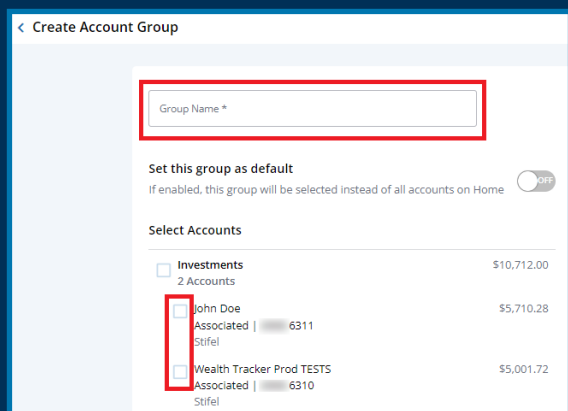
## Account Groups

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](http://www.stifelwealthtracker.com). Select **Manage Accounts** from the left-hand navigation menu, then select **Create** from the **Account Groups** option.



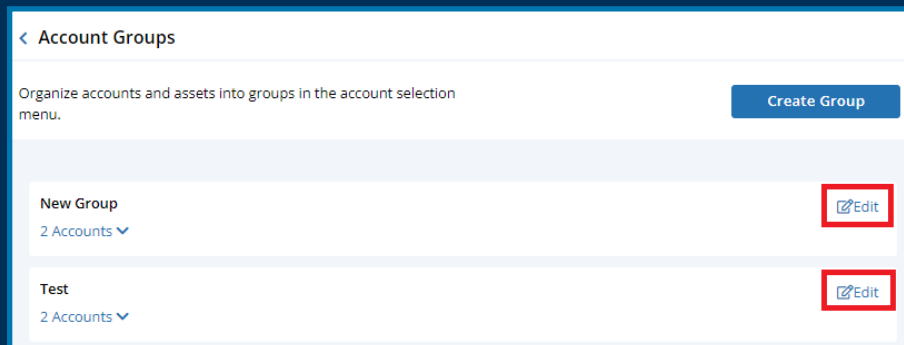
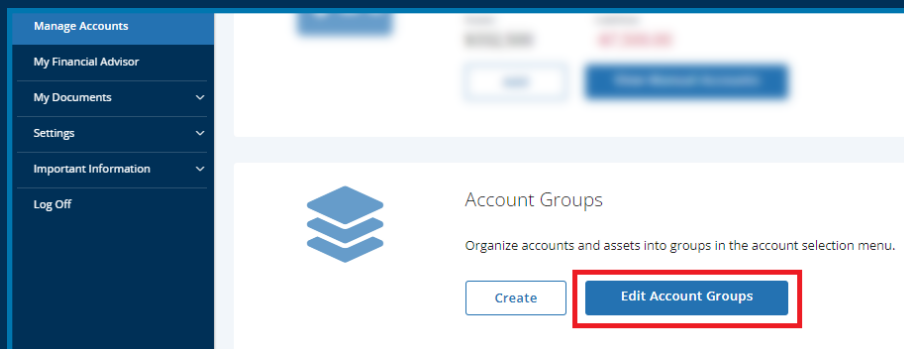
- 2 Create a **Group Name** and select the account(s) to be included in the group as indicated below. **Note:** To set this group as the **default** (if enabled, this group will be selected instead of all accounts on the home page), toggle the button shown below to select **ON**. Select **Save** at the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

**Monday – Friday**

6:00 a.m. – 7:00 p.m. Central

**Saturday**

7:30 a.m. – 4:00 p.m. Central