STIFEL WEALTH TRACKER

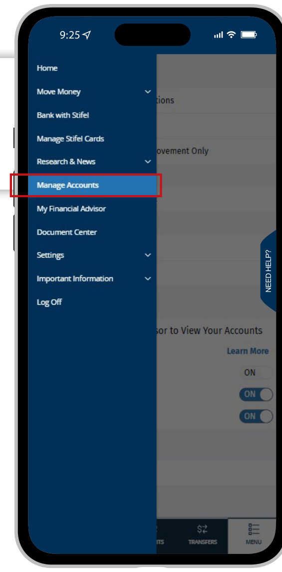
Manage and Create Account Groups

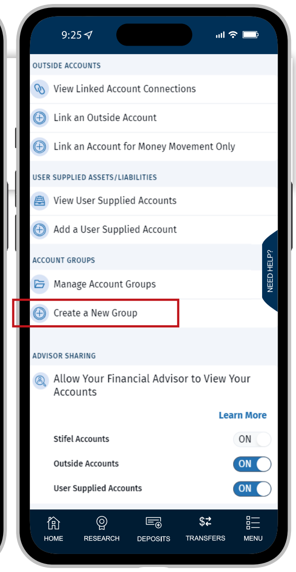
Organize your accounts and assets into groups that work for you.

Wealth Tracker lets you create custom groups for viewing your accounts just the way you like. Create and set a default group to view every time you log in.

1

Navigate to **Manage Accounts** and select **Create a New Group** from the **Account Groups** section.



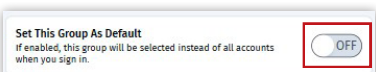


2

Create a **Group Name** and select which account(s) you want to include.

To set this group as the **default**, toggle the button **ON** and click **Save** when finished.

Note: If the default setting is enabled, the group will be selected instead of all accounts on the home page.

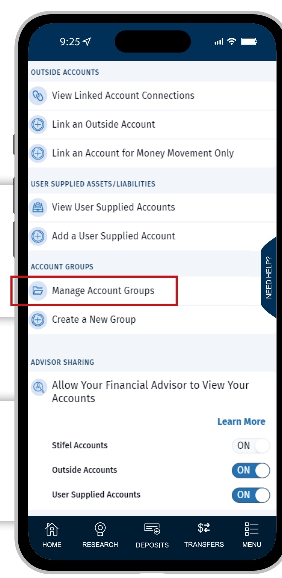


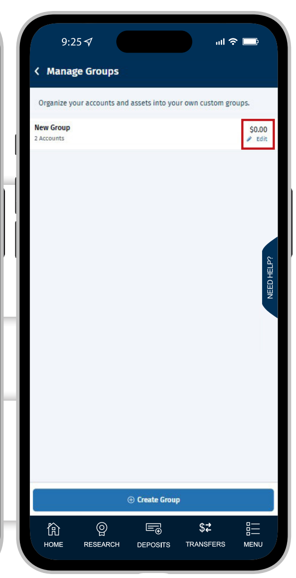
3

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

4

To edit an existing Account Group, navigate back to Manage Accounts, then select **Manage Account Groups**.





Questions?

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

Monday – Friday	Saturday
5:00 a.m. – 8:00 p.m. Central	5:00 a.m. – 6:00 p.m. Central

Log In Now!
tracker.stifel.com

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