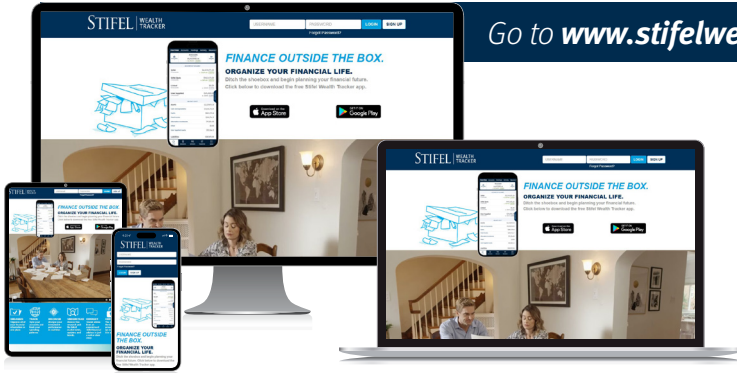


Go to www.stifelwealthtracker.com and select **Sign Up**.



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.

The first screenshot shows the Stifel Wealth Tracker login screen. It has a blue header with the Stifel logo and 'WEALTH TRACKER'. Below the header, it says 'You are logging in on a new device or browser. Stifel Wealth Tracker Multi-Factor Authentication allows users to manage trusted devices and browsers. Please select a target:'. There are three input fields: 'Call me : (000) XXX-XXXX', 'Text me : (000) XXX-XXXX', and 'E-mail me : XXXXX@XXXXX.com'. A 'Back' button is at the bottom. A large blue arrow points to the second screenshot.

The second screenshot shows the 'Secure Access' screen. It has a blue header with the Stifel logo and 'WEALTH TRACKER'. Below the header, it says 'Secure Access'. Underneath, it says 'Your verification code should arrive by SMS shortly. Enter the code below:'. There is a 'Verification Code' input field and a 'Verify' button. A red arrow points to the 'Verification Code' input field.

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**.

The screenshot shows a blue screen with the text 'Do you want to register this device or browser for future use?'. Below this text, it says 'Access Code Accepted.'. There are two buttons: 'Do Not Register Device' and 'Register Device'. The 'Register Device' button is highlighted with a red box.

7

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

The screenshot shows a smartphone screen displaying the Stifel Wealth Tracker User Agreement. The screen has a white background with black text. At the top, it says 'Stifel Wealth Tracker USER AGREEMENT'. Below this, it says 'Last updated September 15, 2021'. There is a link that says 'View and download Full Terms and Conditions and What's Changed?'. The main text is the 'Stifel Wealth Tracker Terms of Use Agreement'. At the bottom, there are two buttons: 'I Do Not Accept' and 'I Accept'.

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](https://wealthtracker.stifel.com)