FAITH TRACKER

How to Share Accounts

STIFEL WEALTH	Welcome back, Good Morning, Valued Clien Las: lager 02/07/02/5 or 1.35 PM
Home	Account Settings
Move Money	
Bank with Stifel	Sharing Nicknames Quicken
Manage Stifel Cards	
Research & News	Account Sharing You can give permission for your family, accountant, or anyone of your choosing to access one or more of your accounts. Sharing
Manage Accounts	an account grants your trusted individual access to your Stifel or Stifel Bank account, to enable them to stay up to date on the details of the account(s).
My Financial Advisor	Share Accounts +
Document Center	
Settings -	
Profile	
Account Settings	
Alerts	
Alert Preferences	

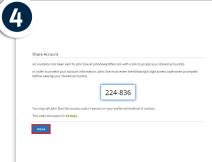
Navigate to **Settings** and select **Account Settings**. Then choose **Share Accounts** from the Sharing tab.

Share Account		
Before granting access for an individual to view your accou	nt(s), let's understand what it means to share an account.	
In Your Control		
You may want to share one or all of your accounts with a fu individual. At any time, you may add or remove accounts th access to view your accounts altogether.		
View-Only Access		
Sharing your account grants that individual view-only acces while keeping your accounts safe.	s. This allows trusted individuals visibility to your finances.	
View-0	nly Access	
S Individuals Can:	S Individuals Cannot:	
View your account balances, holdings, tax details,	Make changes to your account	
 and transactions View and download documents, including 	Adjust Stifel Wealth Tracker preferences Perform any trades or transactions	
statements, confirms, and tax forms	Share your account with another individual	
Invitations		
Sharing your account is a two-step process in order to keep		
some basic information so that we can automatically send unique access code that you will need to give to the individ		
Once that individual has both the invitation link and access Stifel Wealth Tracker to view your shared accounts.	code, he or she can accept your invitation and begin using	

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

Enter the E-Mail Address, Mobile Number, and 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.



After selecting Share, a confirmation window will appear confirming that the trusted individual has been sent an invitation to view the shared accounts.

Contact the trusted individual in a manner that deems secure to provide the 6-digit access code displayed in the confirmation window. The trusted individual must enter this code when accepting the sharing invite and will have 14 days to accept the sharing invite before it is automatically revoked.

Select **Done** to complete the sharing process.

Shared Accounts

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Accounts Shar	ed By User		
Shared With		Trusted Person (PENDING)	
		Get Access Code	
Accounts Share	d	Stifel Financial XXXX-XXXX	
🖉 Edi	t	Revoke Acces	KEED HELP?
			ų.

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 5:00 a.m. – 8:00 p.m. Central

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



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