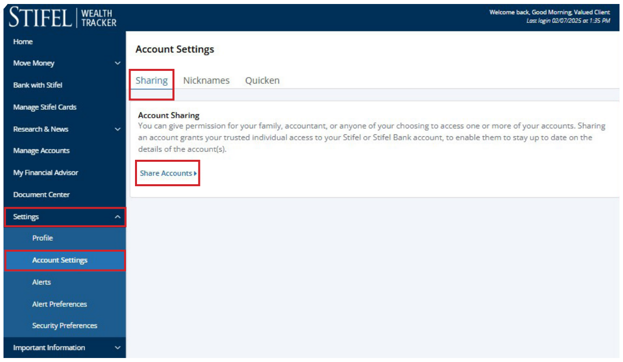
STIFEL WEALTH TRACKER

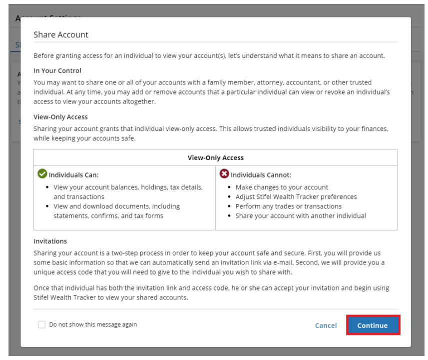
How to Share Accounts

1



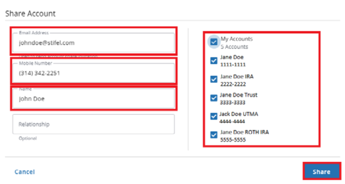
Navigate to **Settings** and select **Account Settings**. Then choose **Share Accounts** from the Sharing tab.

2



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

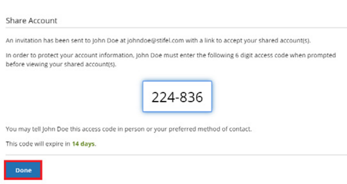
3



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.

4

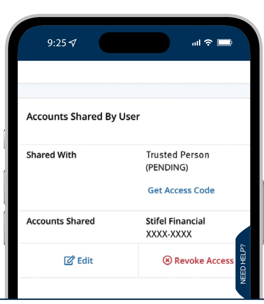


After selecting **Share,** a confirmation window will appear confirming that the trusted individual has been sent an invitation to view the shared accounts.

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



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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