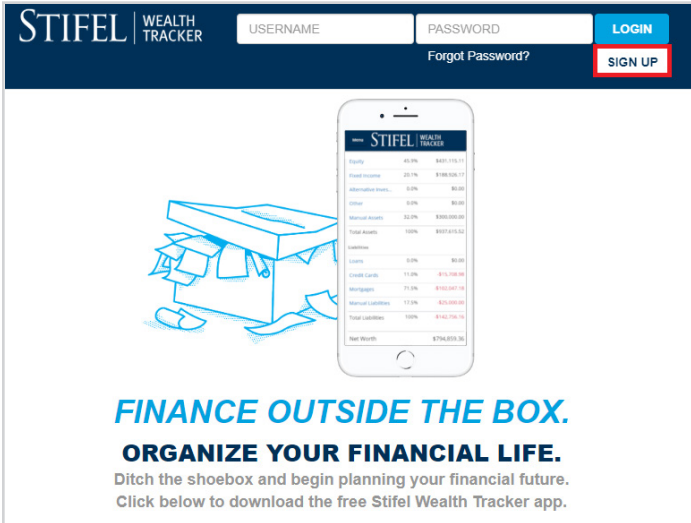


1. Navigate to www.stifelwealthtracker.com and select **Sign Up**.



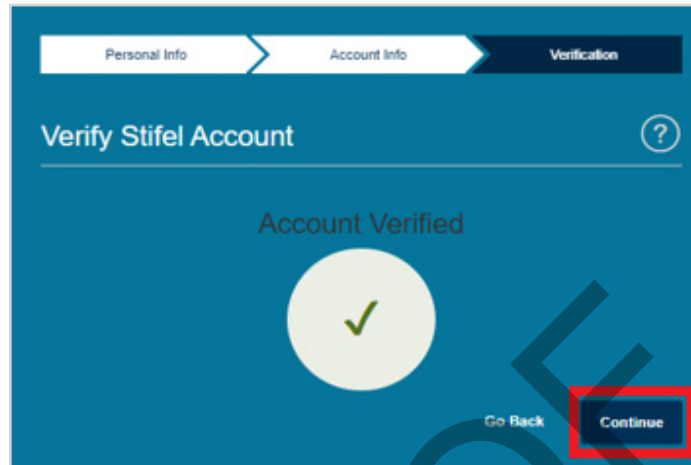
2. Complete the enrollment fields by indicating client status, creating a username, password, and providing contact information.

Please Note: The e-mail address and phone number will require validation later in the enrollment process.

3. Complete the **additional enrollment fields**, including:
 - Stifel Account Number
 - Date of Birth
 - Social Security Number

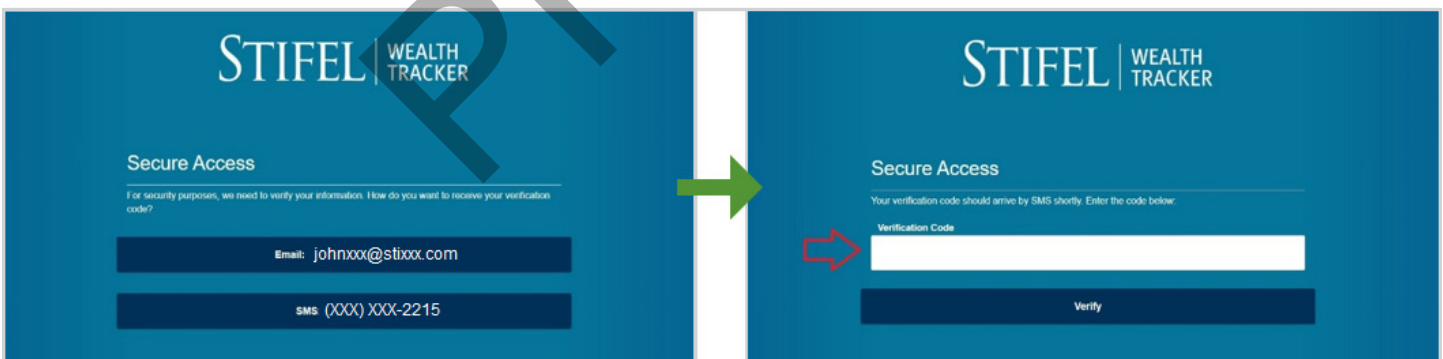
4. A series of questions will be asked to authenticate. Please choose the correct answer per question and select **Continue**.

5. Once the required questions have been successfully completed, the below message will appear. Select **Continue** to proceed.

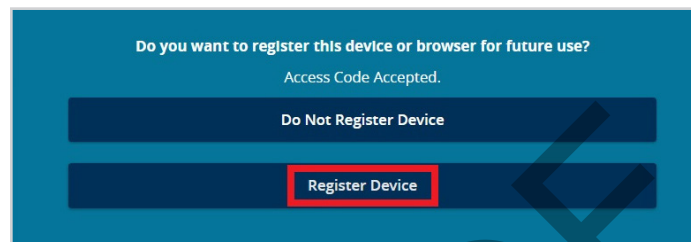


6. To verify that a valid e-mail address and mobile phone number have been entered, there will be a prompt to verify the information with a Secure Access Code. Choose the method of delivery, enter the Secure Access Code delivered via text or e-mail, and then select **Verify**.

Please Note: Stifel's electronic document delivery feature requires a validated e-mail address. Please choose to verify the e-mail address if electronic delivery settings will be changed upon first login.



7. After successful validation, a user agreement will display. Please read carefully and select **"I Accept"** if you agree and wish to continue.
8. 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**.



Do you want to register this device or browser for future use?

Access Code Accepted.

Do Not Register Device

Register Device

The screenshot shows a blue dialog box with a white border. At the top, it asks 'Do you want to register this device or browser for future use?'. Below that, 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 rectangular border.

Questions?

Contact Stifel Wealth Tracker at **(866) 697-8433**.

Monday – Friday
6:00 a.m. – 7:00 p.m. Central
Saturday
7:30 a.m. – 4:00 p.m. Central

STIFEL
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