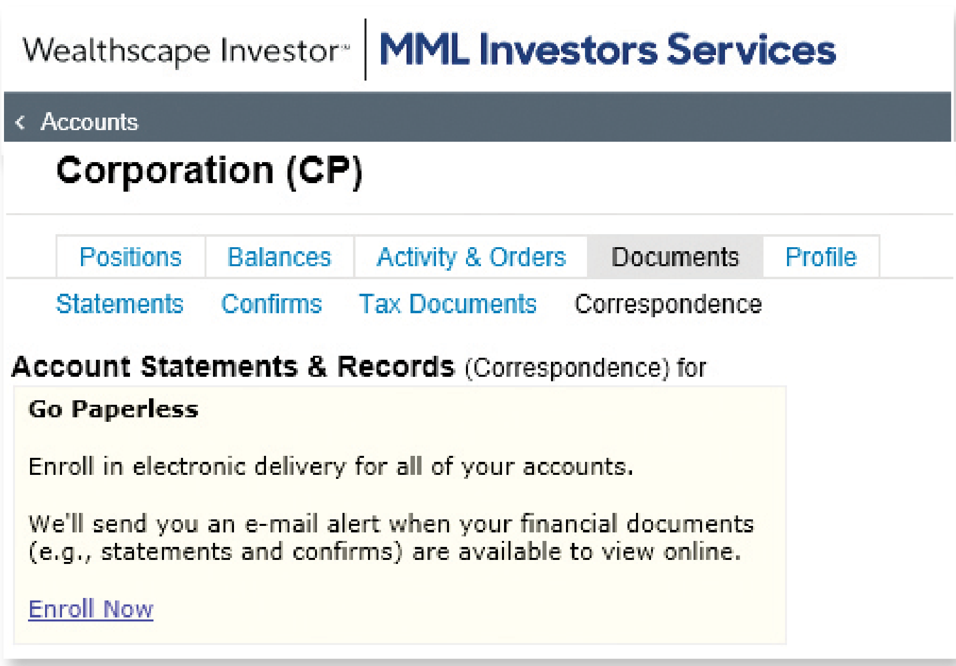
ACCESS KEY DOCUMENTS

With Wealthscape Investor, you'll always have access to your statements, confirms, tax documents and correspondence. To view documents:

1. Click **Accounts** and select the account you want to access documents for.
2. Select the **Documents** tab.
3. Select one of the links below the Documents tab for the type of document you want to view.

In addition, you can import your eligible tax forms into TurboTax and H&R Block by accessing those websites directly.



This material does not constitute a recommendation to engage in or refrain from a particular course of action. The information within has not been tailored for any individual.

Use of the Wealthscape Investor Brokerage Mobile app requires an active Online Brokerage Account.

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