



# WestPoint

C A P I T A L



## ACCESS YOUR ACCOUNT INFORMATION

Once your registration is complete, you may access your accounts, positions and balances online.

1. Log in to your account at [www.wealthscapeinvestor.com/mmlis](http://www.wealthscapeinvestor.com/mmlis).
2. Select the account you wish to view from the list in the left-column.
3. Select the tabs at the top of the page to view your account holdings, activity updates and two years of transaction history.

You can customize the layout of your Account Positions screen to sort and filter the data you want to focus on.

The screenshot displays the 'Individual (I)' account page. The left sidebar shows a list of accounts with a total value of \$0.00. The main content area is divided into several sections:

- Account Balances for:** A table showing Total Account Value, Total Securities Market Value (MV), and Available to Trade.
- Securities Market Value (MV):** A table showing Total Securities Market Value, Cash Sweep Fund (1), and Cash (1).
- Available to Trade:** A table showing Subst Cash, Unsettled Cash Credit, and Unsettled Cash Debit.
- Buying Power:** A table showing Cash Only.
- Available to Withdraw:** A table showing Cash Only.
- Option Balances:** A table showing Options in the Money, Cash Covered Put Reserves, and Total Options Securities Market Value.
- Restricted Securities:** A table showing Non-Liable Securities Market Value and Liable Securities Market Value.

Footnote: 1. Non-Liable shares are not included in Margin (2) Securities Market Value but are included in the Total Account Value. 2. Liable shares are included in Margin (2) Securities Market Value as well as the Total Account Value. Recent values are calculated using delayed prices (15 minutes) for the underlying securities. In certain cases where delayed prices are unavailable, closing price is used.

Visit [www.wealthscapeinvestor.com/mmlis](http://www.wealthscapeinvestor.com/mmlis) to register for online access today!

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

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