Wealthscape Investor New User Registration and Paperless Sign-up Guide

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New User Registration – User Created

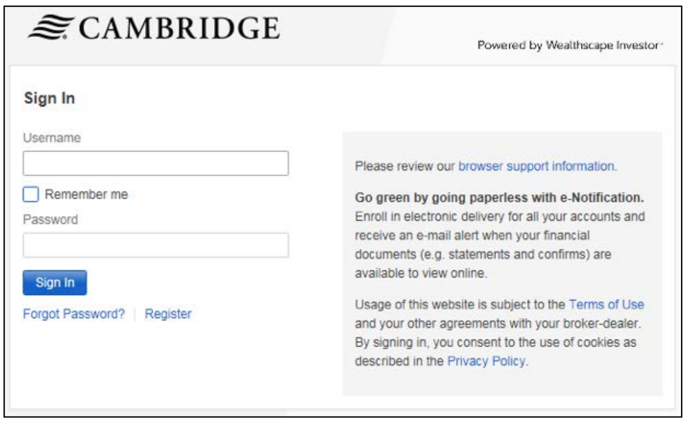
Wealthscape Investor New User Registration

The Wealthscape Investor℠ new user registration function allows you to register for access to Wealthscape Investor on your own. After registering, you will be able to access your brokerage account online and have the option to go paperless by signing up for e-notification. In order to register for Wealthscape Investor, you must have an active brokerage account with Fidelity Clearing & Custody Solutions℠ (FCCS) and have a Social Security number (SSN).

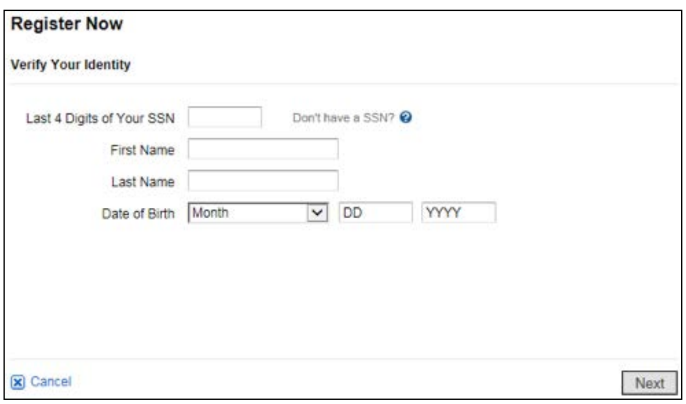
After registering, you will have access to all accounts on which you are listed as a holder. If you open new accounts, they will automatically be linked to your investor ID. All account holders listed on joint or trust accounts will have the ability to register for Wealthscape Investor access.

How to Register for a Wealthscape Investor ID

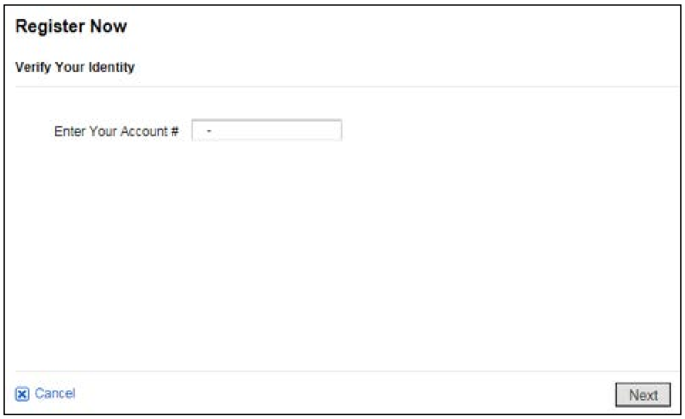
- Go to wealthscapeinvestor.com/cir. Click the **Register** link on the Login Page.



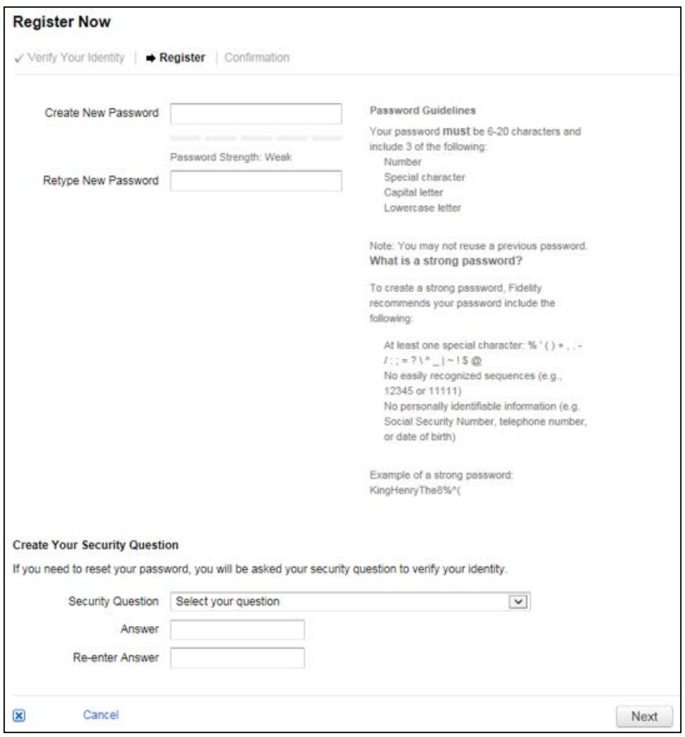
- Enter the last four digits of your SSN, your first and last name, your date of birth, and click **Next**



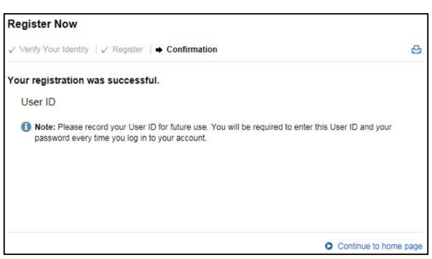
- Enter the account number you wish to access and click **Next**



- Create and verify your new password
- Select a security question and type your answer in the box below. Then, re-enter your answer and click **Next.**



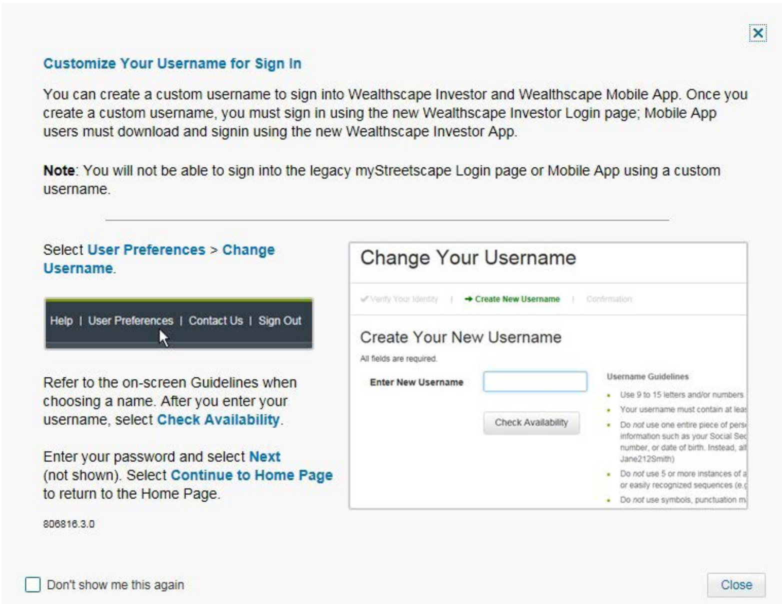
- The confirmation window will display when your registration was successful



- Print the confirmation page by clicking the **Print** icon
- Click **Continue to home page** to proceed directly to the page that contains all your account information

Customize Your Username for Sign In

You can create a custom username to sign into Wealthscape Investor and the Wealthscape Mobile App. Once you create a custom username, you must sign in using the new Wealthscape Investor login you created.



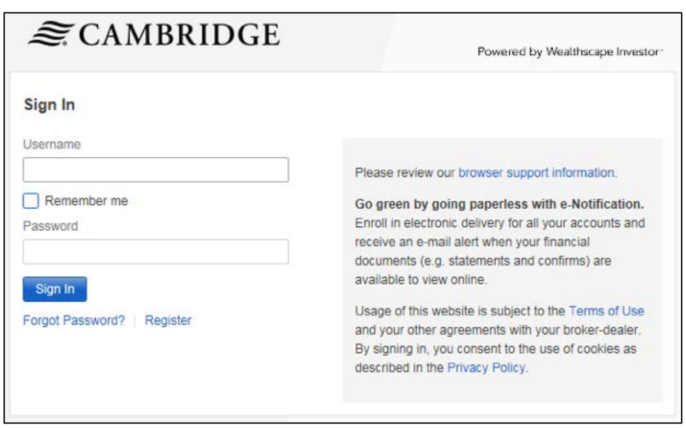
New User Registration – Cambridge Created

If you wish to have Cambridge complete your new user registration for Wealthscape Investor, please contact your financial professional who will fill out a Wealthscape Investor Authorization Form.

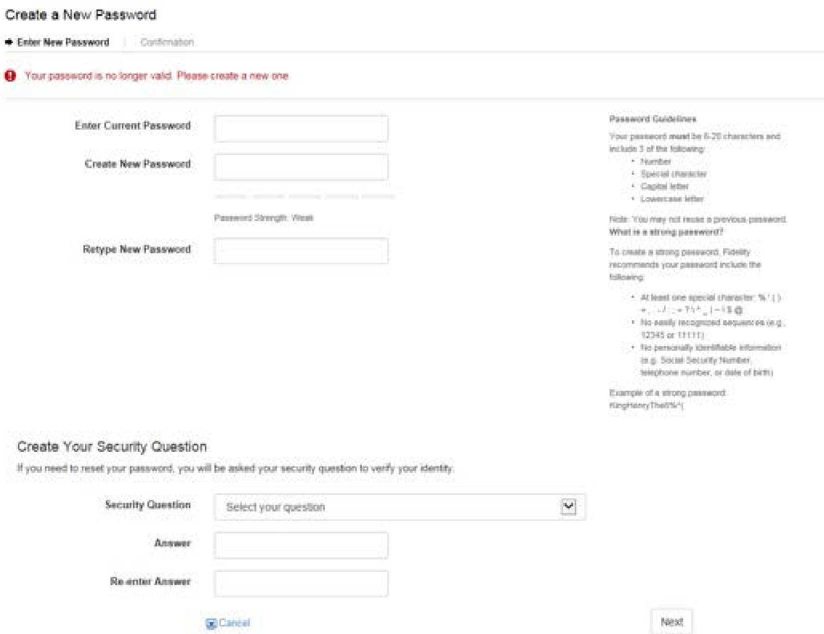
Once your user registration is created, Cambridge will email your username and password to your financial professional who will be responsible for emailing that information to you. Once registered, you will be able to access your brokerage account online and have the option to go paperless by signing up for e-notification. In order to register for Wealthscape Investor, you must have an active brokerage account with FCCS and have a SSN.

Log In

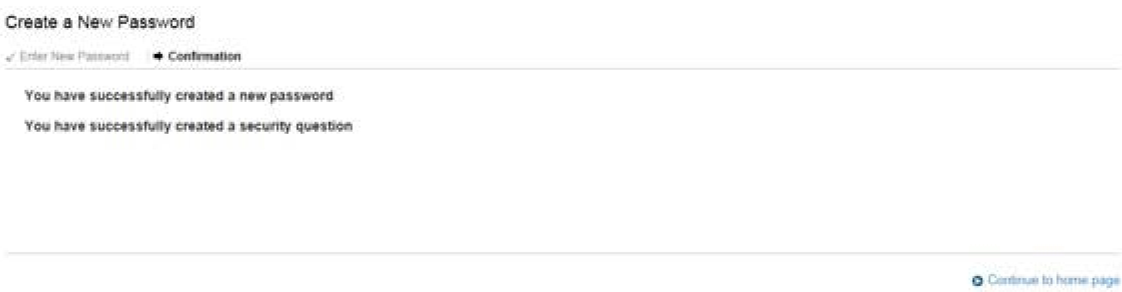
Go to wealthscapeinvestor.com/cir and enter your username and password that was provided by your financial professional and click **Sign In.**



You will be prompted to create a new custom password and select a security question.

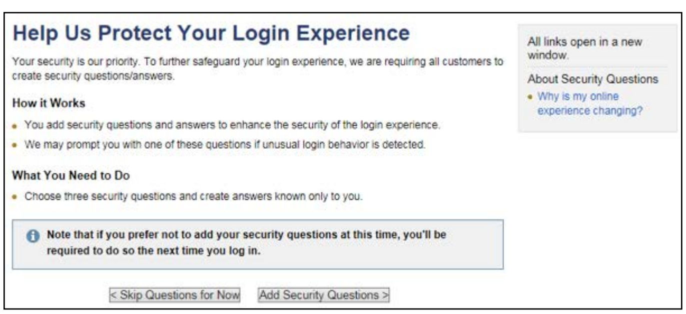


The confirmation page will display when your password and security question have been set up successfully. Click **Continue to home page**.



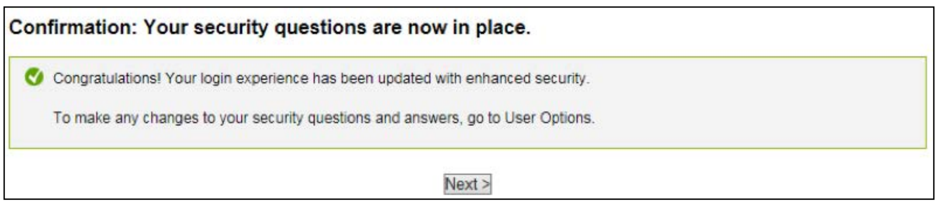
Additional Security Questions

Once logged in, you will be prompted to enter additional security questions for your username. Click **Add Security Questions.** If you click **Skip Questions for Now,** the next time you log in, you will be required to add the additional security questions.



After you have selected your security questions and provided your answers, click **Submit**

The confirmation window will display when your security questions were successful, click **Next**

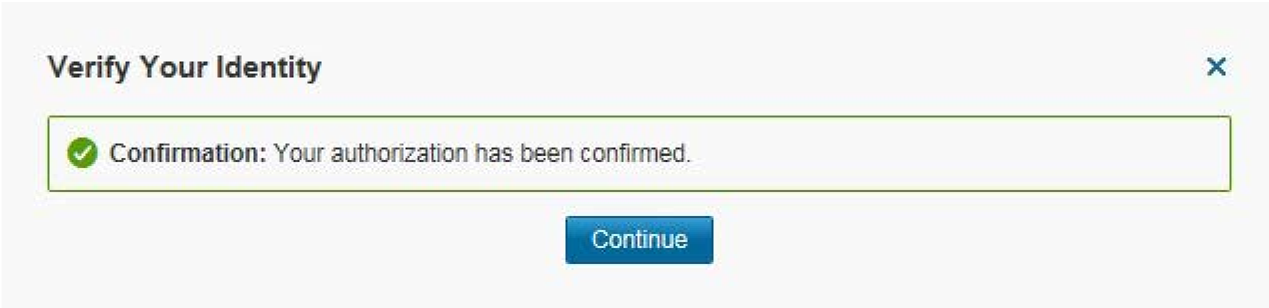


The user agreement will appear after completing your security questions. Once you have read the terms, click **Accept** at the bottom of the screen.

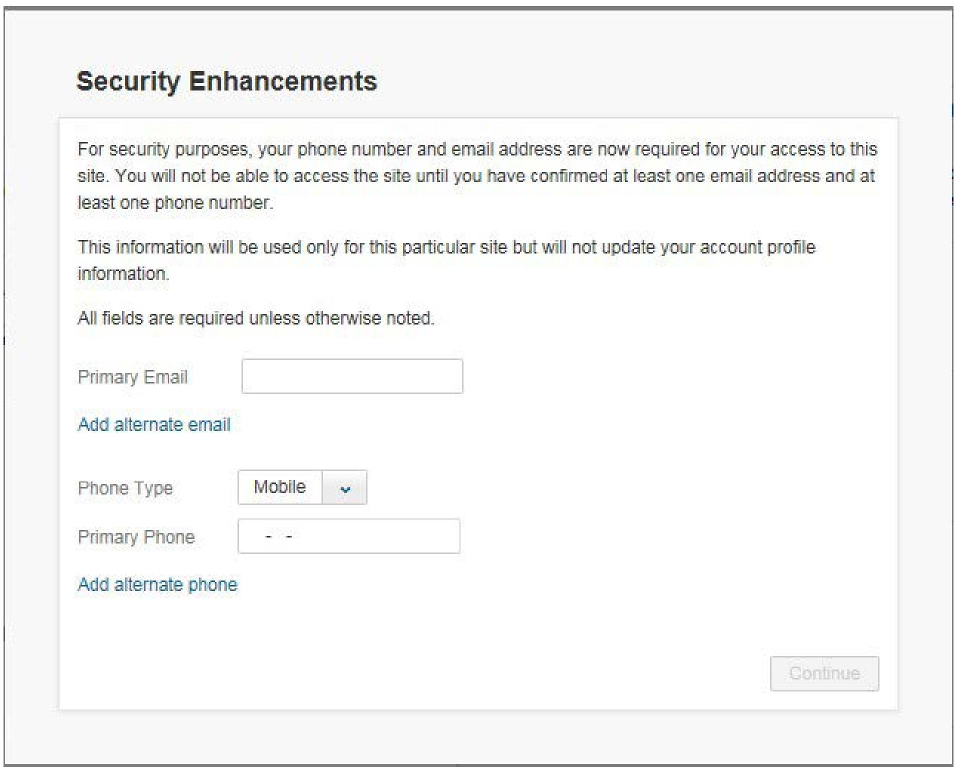
Verify Your Identity/Security Enhancements

Once logged in, it will prompt you to verify your identity. Input the last four digits of your SSN, first name, last name, and date of birth, then click **Submit**.

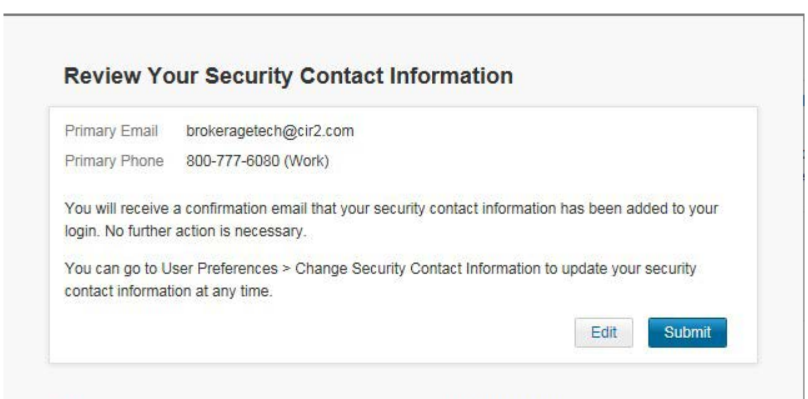
The confirmation page will display once your identity has been verified.



You will be prompted to input security enhancement information. This information will be your primary email and phone number, which must be entered in order to continue to the Wealthscape Investor site.
Click **continue**.



Once the security enhancement information has been accepted, click **Submit**.



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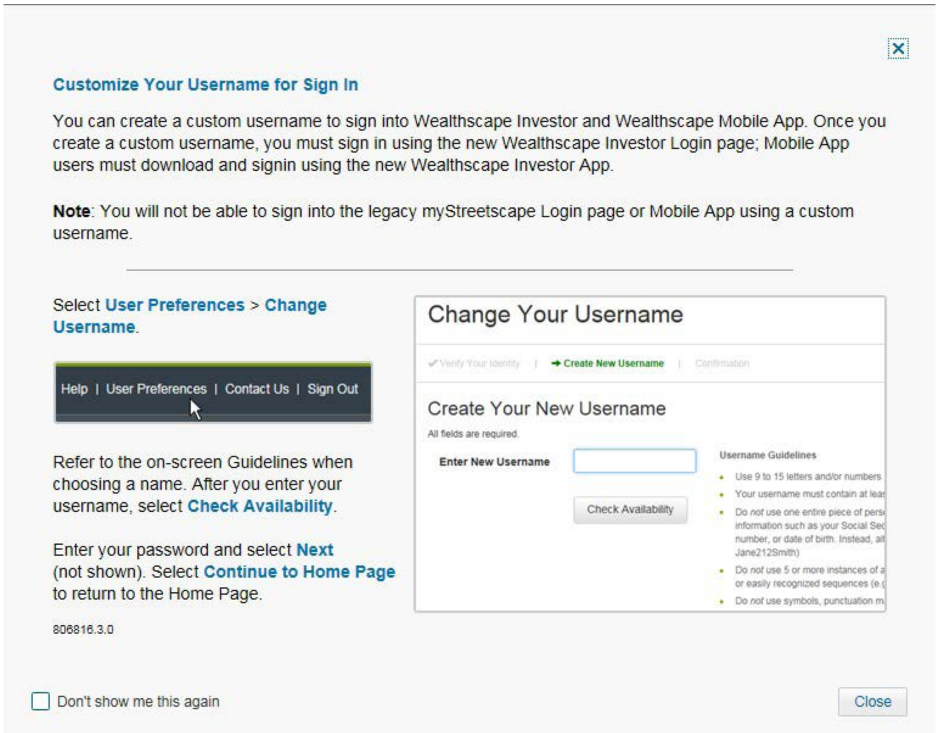
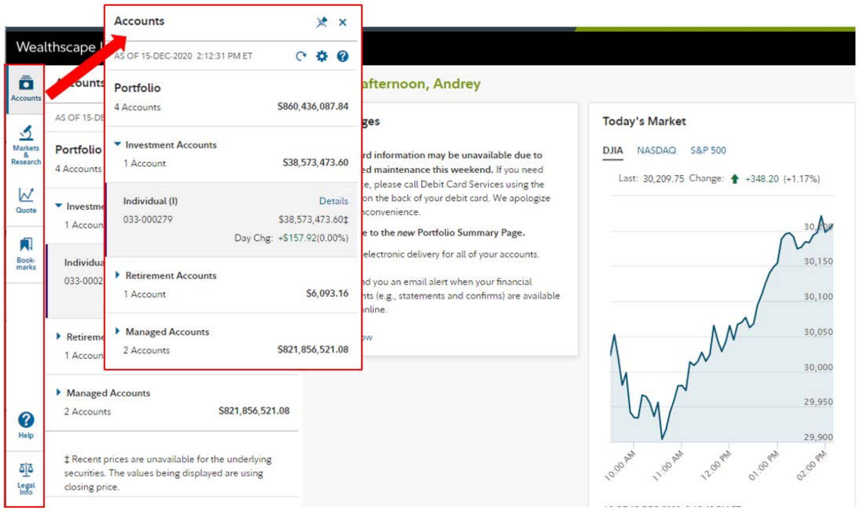


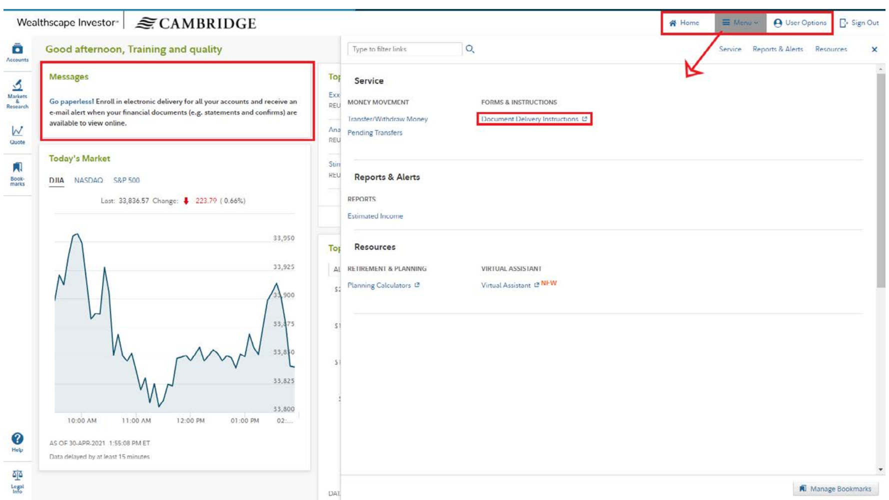
Your Wealthscape Investor account homepage will appear. To view your accounts, click **Accounts** in the top left corner of the screen. On the Accounts page, you will find a general overview of each account associated with your username.



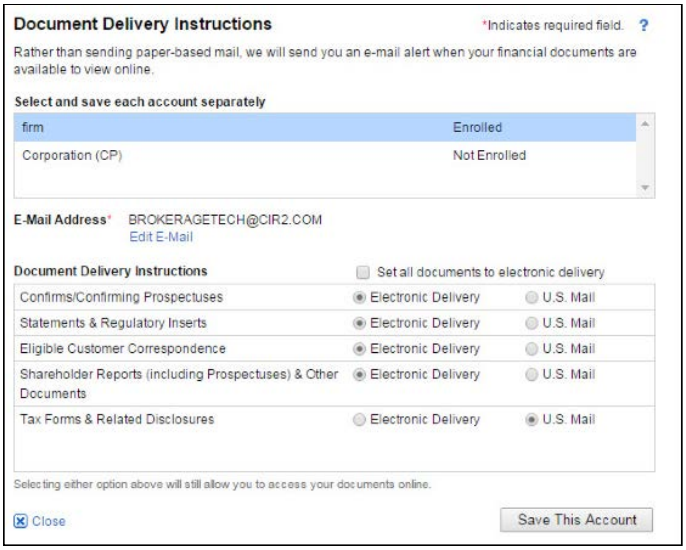
Go Paperless

You can enroll in electronic delivery (eDelivery) for all accounts. Wealthscape Investor will send an email alert when financial documents (e.g., statements and confirmations) are available to view online.

To sign up for paperless options, click **Go paperless!**

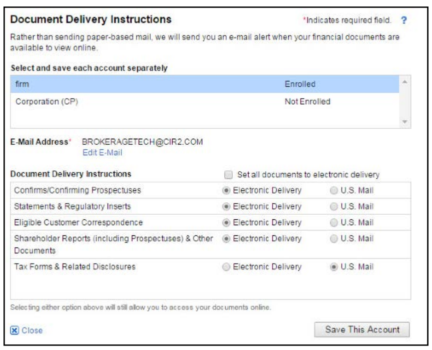


Under Document Delivery Instructions, select the circle next to **Electronic Delivery** for each account you would like eDelivery setup with. If you wish to setup eDelivery for all account, select the box next to **Set all documents to electronic delivery.** Once you have selected your options, click **Save This Account.**

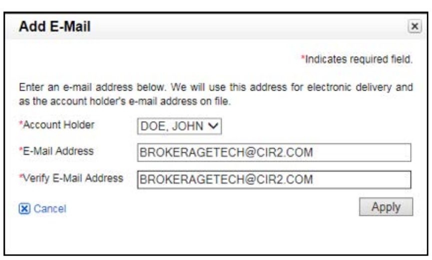


Add or Edit Email Address

On the same screen, if you wish to add or edit your email address, click **Edit E-Mail.**

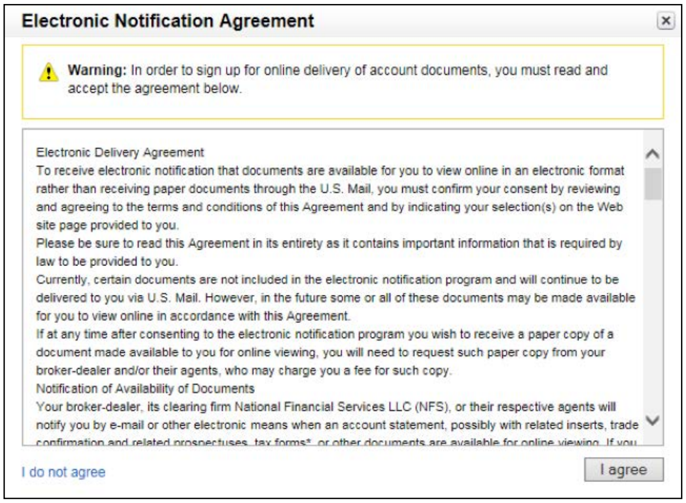


Enter your email address in both boxes and click **Apply** in the bottom right corner of your screen. The box will disappear, bringing you back to the Document Delivery Instructions box.



Electronic Notification Agreement

Per SEC regulations, a client must give informed consent to stop the mailing of paper statements and confirmations. Due to these regulations, the client must read and accept the license agreement.



After accepting the Electronic Notification Agreement, you will return to the main page. Please confirm that your settings are correct.

You are now set up to receive eDelivery. You will receive electronic email notifications which will include a link or URL where the document(s) can be accessed, viewed, and printed. You will be provided with instructions on how to access the documents.

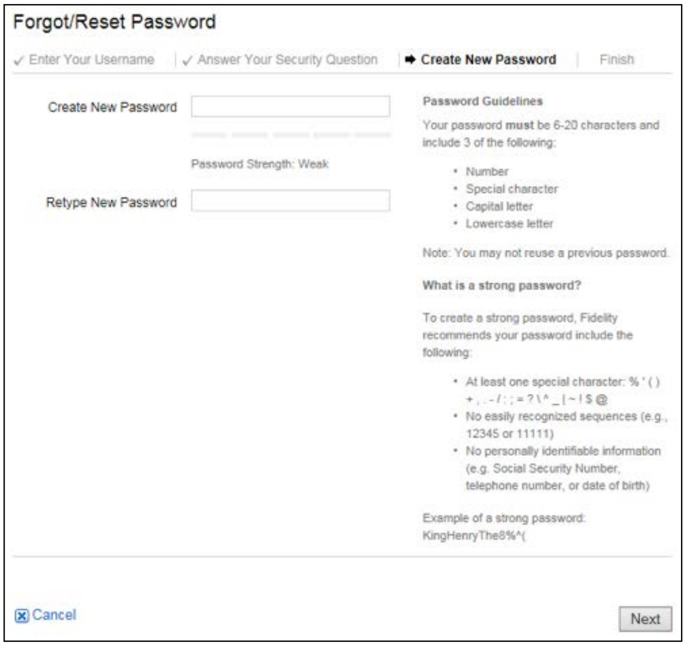
Forgot/Reset Password

If you have forgotten your password or wish to reset your password, visit wealthscapeinvestor.com/cir and click **Forgot Password?**

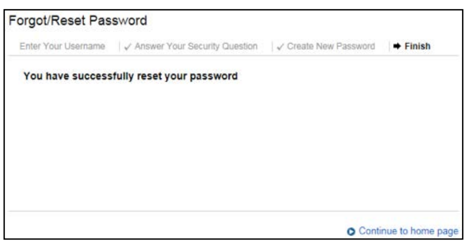
Enter your username and click **Next.**

Answer your security question and click **Next.**

Create and verify your new password and click **Next.**



The confirmation window will display when your new password was created successfully, click **Continue to home page.**



If you have questions, please contact your financial professional.

1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080

*Please note: If you do not sign up for paperless statements, they will be delivered to you via U.S. Mail. You will need to complete the same steps for all of your accounts. If at anytime after consenting to the electronic notification program you wish to receive a paper copy of a document made available to you for online viewing, you will need to request the paper copy from Cambridge.