

Wealthscape Investor  
New User Registration and  
Paperless Sign-up Guide



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## New User Registration – User Created

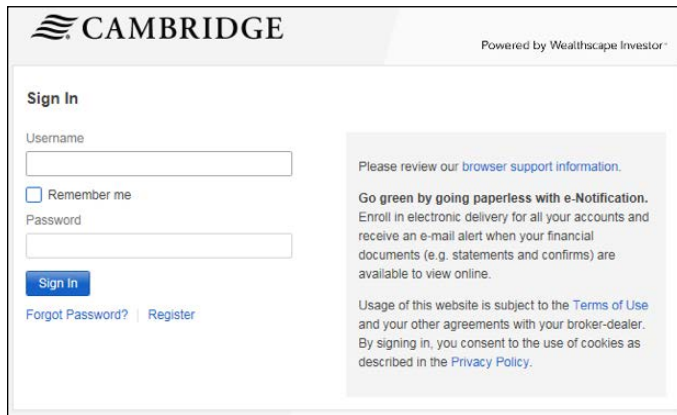
### Wealthscape Investor New User Registration

The Wealthscape Investor<sup>SM</sup> 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<sup>SM</sup> (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.

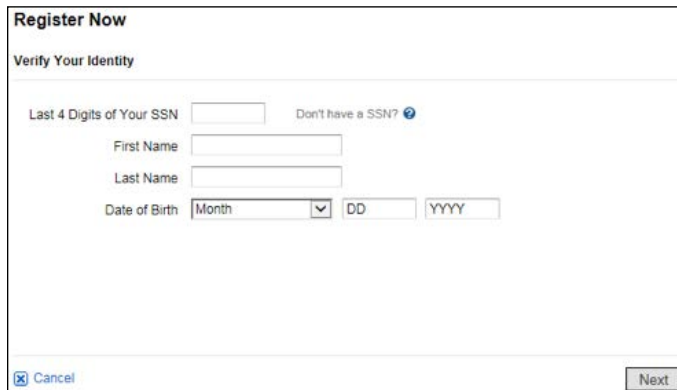
### How to Register for a Wealthscape Investor ID

- Go to [wealthscapeinvestor.com/cir](https://wealthscapeinvestor.com/cir). Click the **Register** link on the Login Page.



The screenshot shows the Cambridge Wealthscape Investor Sign In page. At the top left is the Cambridge logo, and at the top right, it says "Powered by Wealthscape Investor". The main heading is "Sign In". Below this, there are input fields for "Username" and "Password". A "Remember me" checkbox is located between the username and password fields. A blue "Sign in" button is positioned below the password field. To the left of the button are links for "Forgot Password?" and "Register". On the right side of the form, there is a grey informational box containing the following text: "Please review our [browser support information](#). Go green by going paperless with e-Notification. Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online. Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#)."

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



The screenshot shows the "Register Now" page. The heading is "Register Now" and the sub-heading is "Verify Your Identity". Below this, there are several input fields: "Last 4 Digits of Your SSN" with a text box and a "Don't have a SSN?" link; "First Name" with a text box; "Last Name" with a text box; and "Date of Birth" with a dropdown menu for "Month", a text box for "DD", and a text box for "YYYY". At the bottom left, there is a "Cancel" button with a close icon, and at the bottom right, there is a "Next" button.

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

**Register Now**

Verify Your Identity

Enter Your Account #

- 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**.

**Register Now**

✓ Verify Your Identity | **Register** | Confirmation

Create New Password

Retype New Password

Password Strength: Weak

**Password Guidelines**  
Your password must be 6-20 characters and include 3 of the following:  
Number  
Special character  
Capital letter  
Lowercase letter

Note: You may not reuse a previous password.  
**What is a strong password?**  
To create a strong password, Fidelity recommends your password include the following:  
At least one special character: % ' ( ) + , . - / : ; = ? \ ^ \_ | ~ ! \$ @  
No easily recognized sequences (e.g., 12345 or 11111)  
No personally identifiable information (e.g., Social Security Number, telephone number, or date of birth)  
Example of a strong password:  
KingHenryThe8%\*(

**Create Your Security Question**  
If you need to reset your password, you will be asked your security question to verify your identity.

Security Question:

Answer:

Re-enter Answer:

- The confirmation window will display when your registration was successful

**Register Now**

✓ Verify Your Identity | ✓ Register | **Confirmation**

Your registration was successful.

User ID:

Note: Please record your User ID for future use. You will be required to enter this User ID and your password every time you log in to your account.

[Continue to home page](#)

- 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.

**Customize Your Username for Sign In**

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

**Note:** You will not be able to sign into the legacy myStreetscape Login page or Mobile App using a custom username.

Select [User Preferences](#) > [Change Username](#).

Help | [User Preferences](#) | [Contact Us](#) | [Sign Out](#)

Refer to the on-screen Guidelines when choosing a name. After you enter your username, select [Check Availability](#).

Enter your password and select [Next](#) (not shown). Select [Continue to Home Page](#) to return to the Home Page.

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Don't show me this again Close

## 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](https://wealthscapeinvestor.com/cir) and enter your username and password that was provided by your financial professional and click **Sign In**.

**CAMBRIDGE** Powered by Wealthscape Investor

**Sign In**

Username

Remember me

Password

[Sign In](#)

[Forgot Password?](#) | [Register](#)

Please review our [browser support information](#).

**Go green by going paperless with e-Notification.**  
Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online.

Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#).

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

## Create a New Password

Enter New Password | Confirmation

Your password is no longer valid. Please create a new one

Enter Current Password

Create New Password

Retype New Password

Password Strength: Weak

### Password Guidelines

Your password must be 6-20 characters and include 3 of the following:

- Number
- Special character
- Capital letter
- Lowercase letter

Note: You may not reuse a previous password.

### What is a strong password?

To create a strong password, Fidelity recommends your password include the following:

- At least one special character (% ! ' ) , . : ; = ? \* ^ \_ - | \$ %
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g., Social Security Number, telephone number, or date of birth)

Example of a strong password: KingHenryThe5th!

## Create Your Security Question

If you need to reset your password, you will be asked your security question to verify your identity.

Security Question

Answer

Re-enter Answer

Cancel

Next

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

## Create a New Password

Enter New Password | Confirmation

You have successfully created a new password

You have successfully created a security question

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.

### Help Us Protect Your Login Experience

Your security is our priority. To further safeguard your login experience, we are requiring all customers to create security questions/answers.

**How it Works**

- You add security questions and answers to enhance the security of the login experience.
- We may prompt you with one of these questions if unusual login behavior is detected.

**What You Need to Do**

- Choose three security questions and create answers known only to you.

**Note that if you prefer not to add your security questions at this time, you'll be required to do so the next time you log in.**

[Skip Questions for Now](#) [Add Security Questions](#)

All links open in a new window.

About Security Questions

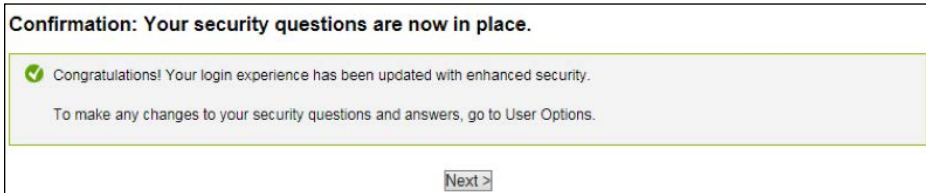
- Why is my online experience changing?

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



The screenshot shows a web form titled "Add Your Security Questions & Answers". At the top, there are "Security Guidelines" with bullet points: "Answers must be between 3 and 31 characters", "Answers can contain both letters and numbers", "Special characters, such as & and (), are not allowed", "Answers are not case sensitive", and "Choose questions with clear answers that you can easily remember". Below this is the heading "Add Security Questions & Create Your Answers" and a note: "These may be used to further verify your identity during log in." A requirement "All fields are required." is shown. The form contains three sets of questions, each with a dropdown menu for "Question:", a text input for "Answer:", and a "Repeat Answer:" field. At the bottom, there is a question "Do you frequently use this computer to access this web site?" with radio buttons for "Yes" and "No", and a note: "Note: If you are using a public computer, you should always select No." A "Submit" button is located at the bottom right.

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



The screenshot shows a confirmation message in a light gray box with a green checkmark icon. The text reads: "Confirmation: Your security questions are now in place." Below this, it says: "Congratulations! Your login experience has been updated with enhanced security." and "To make any changes to your security questions and answers, go to User Options." A "Next >" button is centered at the bottom of the box.

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

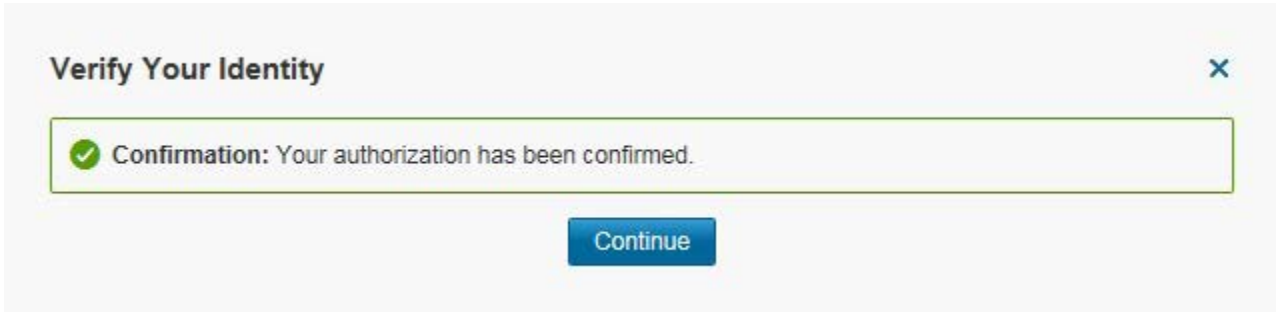
Once logged in, it will prompt you to verify your identity. Input the last four digits of your SSN, first name, last name, and date of birth, then click **Submit**.



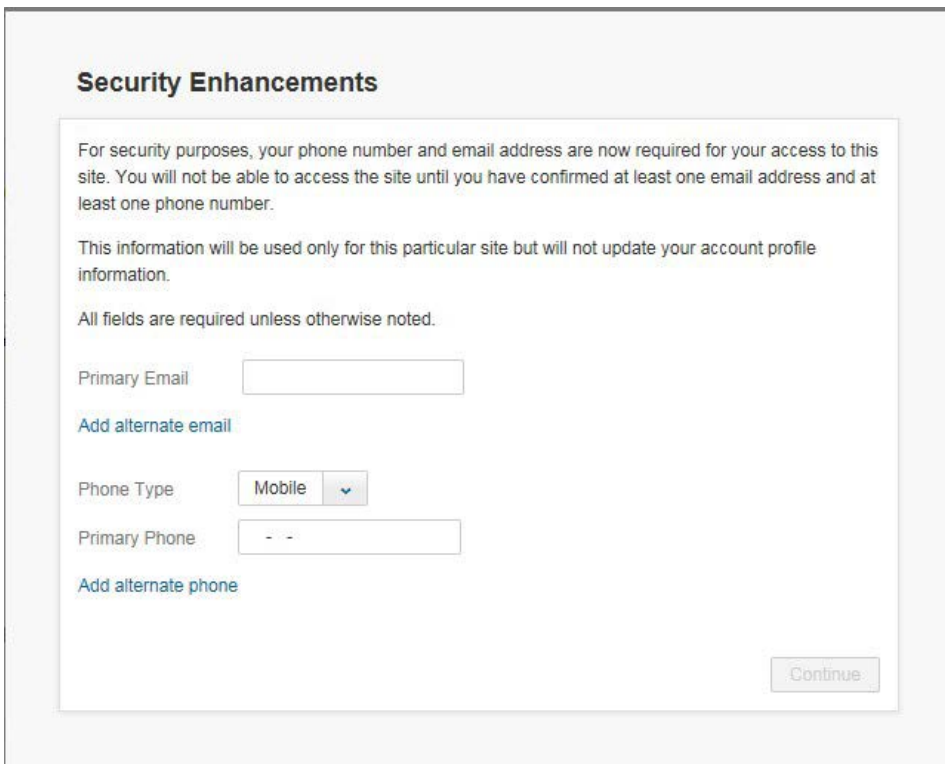
The screenshot shows a form titled "Verify Your Identity" with a close button (X) in the top right corner. Below the title is a note: "Complete this verification form if you are one of the account owners. If you are not an account owner click here." The form has four input fields: "Last 4 Digits of Your SSN" (with a help icon), "First Name", "Last Name", and "Date of Birth" (with a date picker icon and the format "mm/dd/yyyy"). A "Submit" button is located at the bottom center.



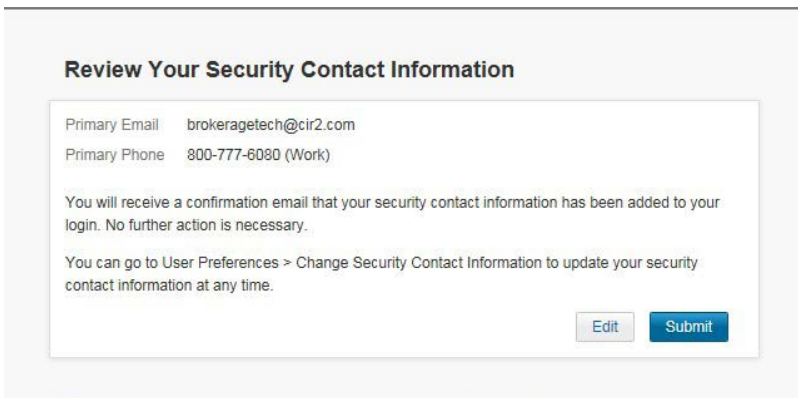
The confirmation page will display once your identity has been verified.



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**.

A screenshot of a "Security Enhancements" form. The form contains the following text: "For security purposes, your phone number and email address are now required for your access to this site. You will not be able to access the site until you have confirmed at least one email address and at least one phone number." "This information will be used only for this particular site but will not update your account profile information." "All fields are required unless otherwise noted." The form includes a "Primary Email" text input field with a link "Add alternate email" below it. It also has a "Phone Type" dropdown menu currently set to "Mobile" and a "Primary Phone" text input field with a link "Add alternate phone" below it. A "Continue" button is located at the bottom right of the form.

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

A screenshot of a "Review Your Security Contact Information" screen. It displays the following information: "Primary Email: brokeragetech@cir2.com" and "Primary Phone: 800-777-6080 (Work)". Below this, it states: "You will receive a confirmation email that your security contact information has been added to your login. No further action is necessary." and "You can go to User Preferences > Change Security Contact Information to update your security contact information at any time." At the bottom right, there are two buttons: "Edit" and "Submit".



## 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.

The screenshot shows a dialog box titled "Change Your Username" with a close button in the top right corner. The dialog is divided into two main sections. The top section, "Create Your New Username", includes a progress bar with three steps: "Verify Your Identity" (checked), "Create New Username" (active), and "Confirmation". Below this, it says "All fields are required." and "Enter New Username" followed by a text input field and a "Check Availability" button. To the right of the input field are "Username Guidelines" listed with yellow bullet points: "Use 9 to 15 letters and/or numbers", "Your username must contain at least 3 characters", "Do not use one entire piece of personal information such as your Social Security number, or date of birth. Instead, use initials (e.g., Jane123456)", "Do not use 5 or more instances of a single character or easily recognized sequences (e.g., 11111)", and "Do not use symbols, punctuation marks, or spaces". The bottom section of the dialog contains a checkbox labeled "Don't show me this again" and a "Close" button.

**Customize Your Username for Sign In**

You can create a custom username to sign into Wealthscape Investor and Wealthscape Mobile App. Once you create a custom username, you must sign in using the new Wealthscape Investor Login page; Mobile App users must download and sign in using the new Wealthscape Investor App.

**Note:** You will not be able to sign into the legacy myStreetscape Login page or Mobile App using a custom username.

Select **User Preferences > Change Username**.

Help | User Preferences | Contact Us | Sign Out

Refer to the on-screen Guidelines when choosing a name. After you enter your username, select **Check Availability**.

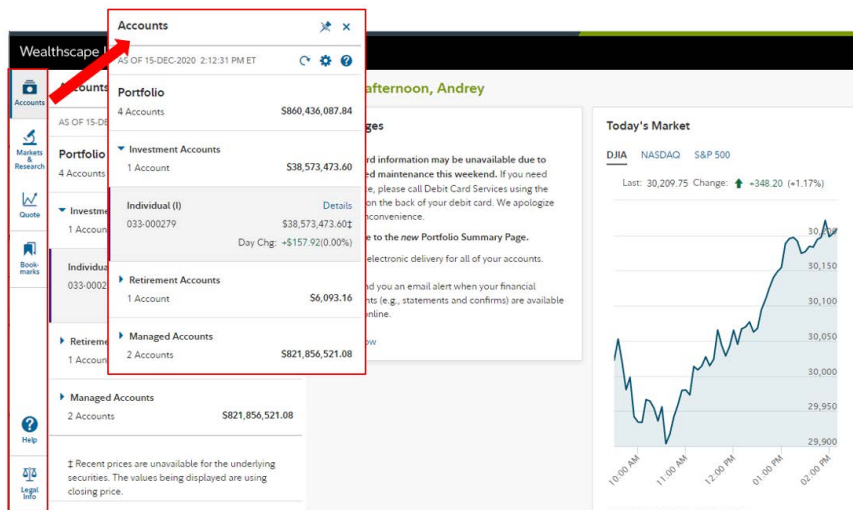
Enter your password and select **Next** (not shown). Select **Continue to Home Page** to return to the Home Page.

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Don't show me this again

Close

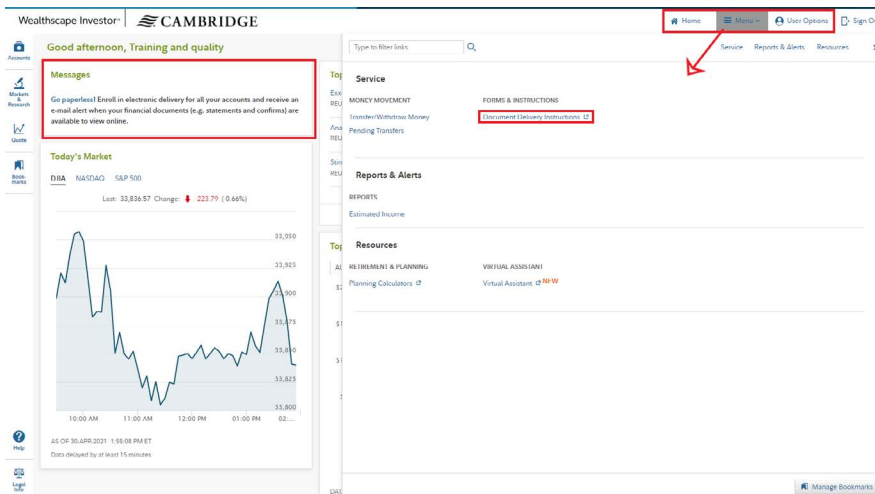
Your Wealthscape Investor account homepage will appear. To view your accounts, click **Accounts** in the top left corner of the screen. On the Accounts page, you will find a general overview of each account associated with your username.



## 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**.

**Document Delivery Instructions** \*Indicates required field. ?

Rather than sending paper-based mail, we will send you an e-mail alert when your financial documents are available to view online.

**Select and save each account separately**

frm	Enrolled
Corporation (CP)	Not Enrolled

**E-Mail Address\*** BROKERAGETECH@CIR2.COM  
[Edit E-Mail](#)

**Document Delivery Instructions**  Set all documents to electronic delivery

Confirms/Confirming Prospectuses	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Statements & Regulatory Inserts	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Eligible Customer Correspondence	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Shareholder Reports (including Prospectuses) & Other Documents	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Tax Forms & Related Disclosures	<input type="radio"/> Electronic Delivery	<input checked="" type="radio"/> U.S. Mail

Selecting either option above will still allow you to access your documents online.

Close

## Add or Edit Email Address

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

**Document Delivery Instructions** \*Indicates required field. ?

Rather than sending paper-based mail, we will send you an e-mail alert when your financial documents are available to view online.

**Select and save each account separately**

frm	Enrolled
Corporation (CP)	Not Enrolled

**E-Mail Address\*** BROKERAGETECH@CIR2.COM  
[Edit E-Mail](#)

**Document Delivery Instructions**  Set all documents to electronic delivery

Confirms/Confirming Prospectuses	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Statements & Regulatory Inserts	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Eligible Customer Correspondence	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Shareholder Reports (including Prospectuses) & Other Documents	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Tax Forms & Related Disclosures	<input type="radio"/> Electronic Delivery	<input checked="" type="radio"/> U.S. Mail

Selecting either option above will still allow you to access your documents online.

Close

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.

**Add E-Mail**  Close

\*Indicates required field.

Enter an e-mail address below. We will use this address for electronic delivery and as the account holder's e-mail address on file.

\*Account Holder

\*E-Mail Address

\*Verify E-Mail Address

Cancel

## 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.

**Electronic Notification Agreement**

**Warning:** In order to sign up for online delivery of account documents, you must read and accept the agreement below.

**Electronic Delivery Agreement**

To receive electronic notification that documents are available for you to view online in an electronic format rather than receiving paper documents through the U.S. Mail, you must confirm your consent by reviewing and agreeing to the terms and conditions of this Agreement and by indicating your selection(s) on the Web site page provided to you.

Please be sure to read this Agreement in its entirety as it contains important information that is required by law to be provided to you.

Currently, certain documents are not included in the electronic notification program and will continue to be delivered to you via U.S. Mail. However, in the future some or all of these documents may be made available for you to view online in accordance with this Agreement.

If at any time 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 such paper copy from your broker-dealer and/or their agents, who may charge you a fee for such copy.

**Notification of Availability of Documents**

Your broker-dealer, its clearing firm National Financial Services LLC (NFS), or their respective agents will notify you by e-mail or other electronic means when an account statement, possibly with related inserts, trade confirmation and related prospectuses, tax forms\*, or other documents are available for online viewing. If you

I do not agree | I agree

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](http://wealthscapeinvestor.com/cir) and click **Forgot Password?**

**CAMBRIDGE** Powered by Wealthscape Investor

**Sign In**

Username

Remember me

Password

[Forgot Password?](#) | [Register](#)

Please review our [browser support information](#).

**Go green by going paperless with e-Notification.**  
Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online.

Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#).

Enter your username and click **Next**.

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

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

**Forgot/Reset Password**

✓ Enter Your Username | ✓ Answer Your Security Question | ➔ **Create New Password** | Finish

Create New Password

Password Strength: Weak

Retype New Password

**Password Guidelines**

Your password must be 6-20 characters and include 3 of the following:

- Number
- Special character
- Capital letter
- Lowercase letter

Note: You may not reuse a previous password.

**What is a strong password?**

To create a strong password, Fidelity recommends your password include the following:

- At least one special character: % ' ( ) + , . - / ; = ? \ ^ \_ [ \ ] \$ @
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g. Social Security Number, telephone number, or date of birth)

Example of a strong password:  
KingHenryThe8%^{

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

**Forgot/Reset Password**

Enter Your Username | ✓ Answer Your Security Question | ✓ Create New Password | ➔ **Finish**

**You have successfully reset your password**

[Continue to home page](#)

If you have questions, please contact your financial professional.



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

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\*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.

Securities offered through Cambridge Investment Research, Inc., a broker-dealer, member FINRA/SIPC, and investment advisory services offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Adviser. Both are wholly-owned subsidiaries of Cambridge Investment Group, Inc. V.CIR.0521-1453