



# Your guide to using Wealthscape Investor<sup>SM</sup>

Online brokerage tools and resources



## On-demand access to accounts, positions and balances

Get the most out of your brokerage account with Wealthscape Investor, your customizable investor portal. You get 24/7 access to your account information so you're more informed and can better work with your financial professional to help you reach your goals.

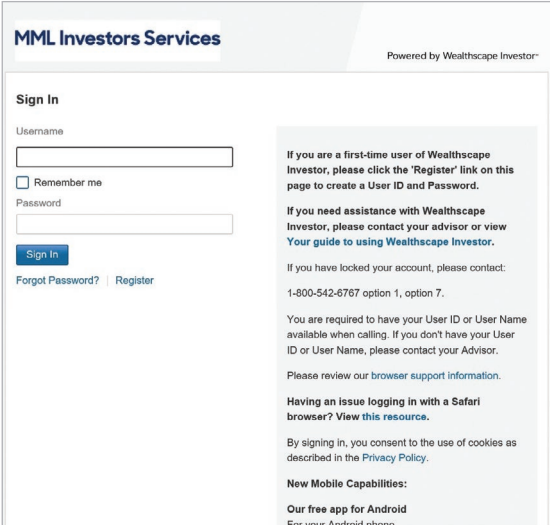
### You can take advantage of:

- A single point of access to account information on your desktop and mobile devices
- Self-service capabilities, including market data and research tools, and mobile check deposit
- Paperless e-notifications for new documents

# Register online:

To get started, you must register for online access at [wealthscapeinvestor.com/mmlis](http://wealthscapeinvestor.com/mmlis). The registration function allows Wealthscape Investor users to self-register without assistance from your financial firm, thus you obtain a user ID and establish a password yourself.

- 1 | Log on to [wealthscapeinvestor.com/mmlis](http://wealthscapeinvestor.com/mmlis) and click the **Register** link.
- 2 | Enter the last four digits of your Social Security number (SSN), your first and last name and date of birth. Select **Next**. Please note, if you do not have an SSN and only have a TIN, please contact your financial professional.
- 3 | Enter the nine-digit Wealthscape Investor account number, and select **Next**.
- 4 | Enter a new password by following the password guidelines, and then select security question-and-answer information.
- 5 | Select **Next**. A confirmation window states that registration was successful and provides the 10-digit user ID. You can print the confirmation page by selecting the **Print** icon.
- 6 | Select **Continue to Home Page** to proceed directly to the landing page.

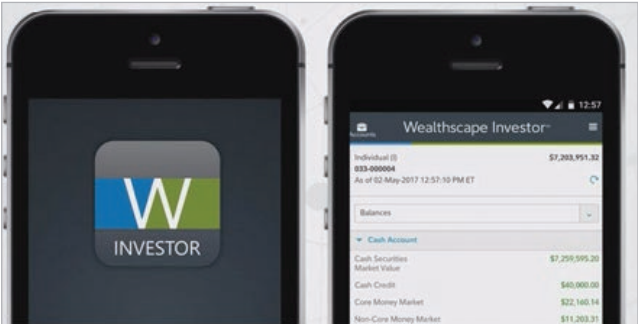


# Stay connected:

Download the Wealthscape Investor Brokerage Mobile app for your tablet and smartphone and tap into your account when you're on the go. The mobile app allows you to:

- Get access virtually anytime.
- Check your account balances, positions and history.
- View market information.
- Create watch lists and price trigger alerts.

Get the free mobile app from the Apple Store or Google Marketplace to access your account from virtually anywhere.

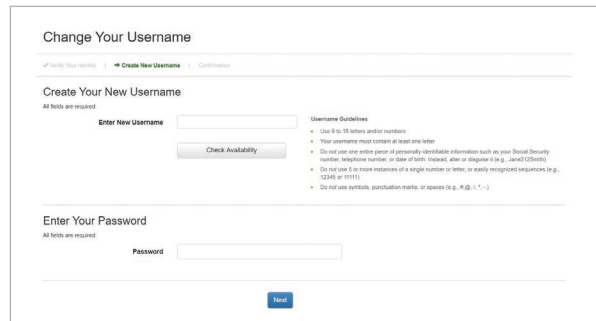




## Create a custom username:

The Custom Username Function allows you to create a custom alphanumeric username to use on both the desktop and mobile app. Usernames can contain nine to fifteen letters and/or numbers, and must contain at least one letter. Symbols, punctuation marks and spaces are not allowed. Custom usernames must be created on the Wealthscape Investor desktop website.

- 1 | Click **User Preferences**.
- 2 | Select **Change Username**.
- 3 | Create new **Username**.



The screenshot shows a web form titled "Change Your Username". At the top, there are navigation links: "Verify Your Identity", "Create New Username", and "Confirmation". The main section is "Create Your New Username", with a note "All fields are required". It features an "Enter New Username" input field and a "Check Availability" button. To the right, "Username Guidelines" are listed: "Use 9 to 15 letters and/or numbers", "Your username must contain at least one letter", "Do not use one or more pieces of personally identifiable information such as your Social Security number, telephone number, or date of birth. Instead, enter or disguise it (e.g., jsm2125687)", "Do not use 4 or more instances of a single number or letter, or easily recognized sequences (e.g., 12345 or 11111)", and "Do not use symbols, punctuation marks, or spaces (e.g., # @ ! ~ -)". Below this is the "Enter Your Password" section, also with a note "All fields are required", featuring a "Password" input field and a "Save" button at the bottom right.

The User Preferences section also allows you to change your Username.

### User Preferences

- [Edit My Account Name](#)
- [Edit Default Start Page and Account](#)
- [Change Security Contact Information](#)
- [Change Username](#)
- [2-Factor Authentication Settings](#)

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

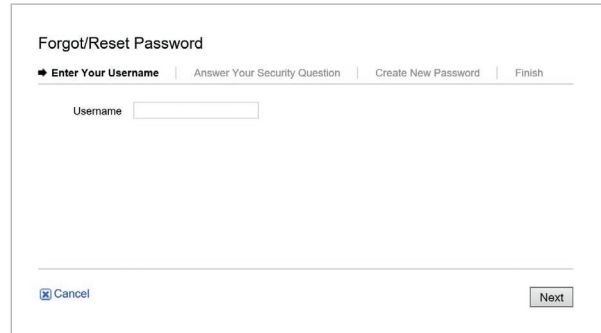


## Reset/change a password:

You can reset and change the password associated with your user ID or username.

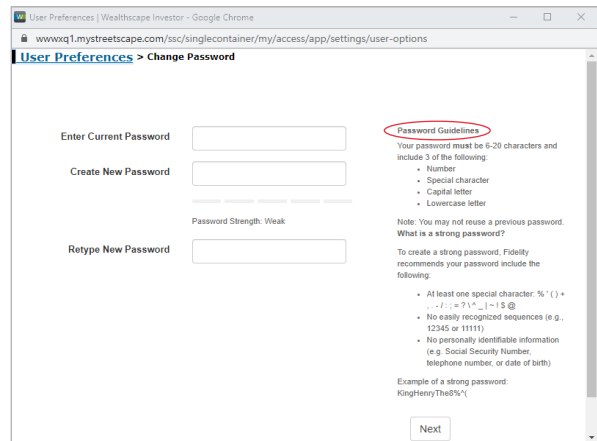
If you have forgotten your password and need to reset it:

- 1 | Log on to [wealthscapeinvestor.com/mmlis](https://wealthscapeinvestor.com/mmlis) and click the [Forgot Password?](#) link.
- 2 | Enter your [User ID/Username](#).
- 3 | Answer your [Security Question](#).
- 4 | Create a [New Password](#).



If you know your current password and want to change it:

- 1 | Click [User Preferences](#).
- 2 | Select [Change Password](#).
- 3 | In the Enter Current Password box, enter the password used to log in for the current session.
- 4 | In the Create New Password box, enter a new password that conforms with the Password Guidelines.
- 5 | In the Retype New Password box, enter the new password again.
- 6 | Click [Next](#).



A message confirms that the password has been successfully changed. You must use this password the next time you log in to Wealthscape Investor.

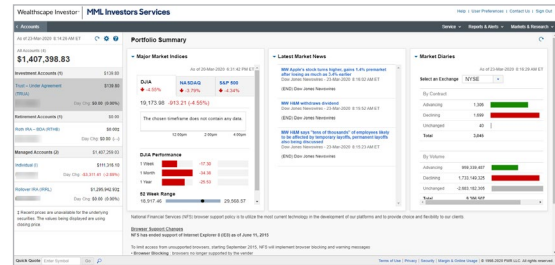
You have up to three attempts to enter the correct password when logging into Wealthscape Investor. If your account is blocked due to multiple unsuccessful login attempts:

- You can call MML Investors Services Representative Services at 1-800-542-6767, option 1, for a password reset. Note that this option is only available if you are able to provide your user ID/username and have an email address associated with your account.
- If you do not know your user ID/username, contact your financial professional for assistance.

## 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.



Do you have checkwriting, debit card, or BillPay? View your cash management features in the **Profile/Features** screen.

## 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.

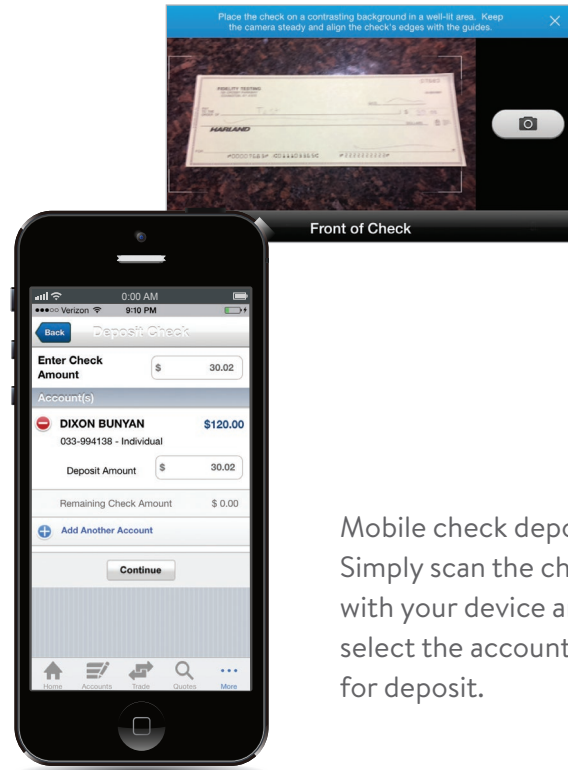
In addition, you can import your eligible tax forms into TurboTax, H&R Block, and TaxAct by accessing those websites directly.

## Deposit checks:

Through the Wealthscape Investor Brokerage Mobile app, Mobile Check Deposit allows users a quick and cost-efficient way to deposit checks for processing, straight from their mobile device. Follow these quick steps:

- 1 | Open the Wealthscape Investor app on your device.
- 2 | From the home screen, select **Money Movement**, then **Deposit Check**.
- 3 | Snap a photo of the front and back of the check using the camera on your device.
- 4 | Follow the prompts to enter the deposit amount and desired account(s). You may split the deposit among up to five different brokerage accounts.
- 5 | Verify the deposit details and submit the deposit.

The mobile deposit is immediately sent to MML Investors Services for review and approval. Once approved, the deposit is transmitted to the bank for processing and posted to the brokerage account. Deposits submitted on a business day prior to 4 p.m. ET and in good order will be posted the same business day.



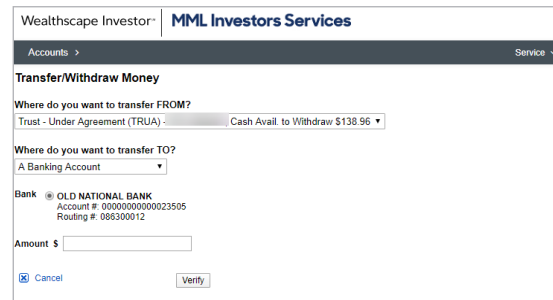
Mobile check deposit:  
Simply scan the check  
with your device and  
select the account  
for deposit.



## Initiate money movement:

You can initiate money transfers and view the status of any pending transfers. However, the money movement feature is entitlement-based and your financial professional must request the functionality for you.

- 1 | Click on **Service > Transfer/Withdraw Money**.
- 2 | Select where to transfer money to and the amount. Depending on your account profile, you can transfer using EFT, check disbursement or to another brokerage account.
- 3 | Click **Verify** to display details. If no changes are needed, click **Submit**.
- 4 | The confirmation window will appear with a confirmation number for submission.
- 5 | To check status on any pending transfers, select **Service > Pending Transfers** from the menu bar.



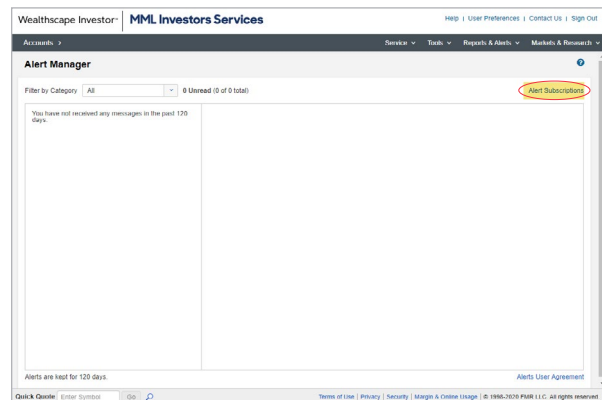
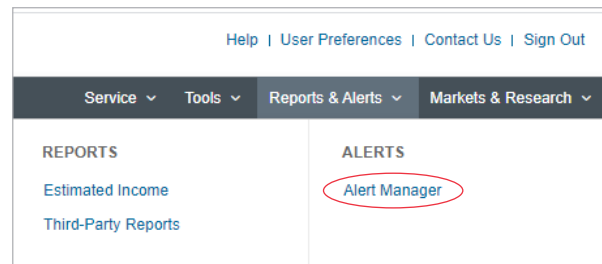
## Subscribing and unsubscribing to alerts:

Use this reference sheet for the basic steps for subscribing and unsubscribing to alerts on Wealthscape Investor.

### Accessing Alert Manager:

- 1 | From the **Reports and Alerts** select **Alert Manager**.
- 2 | The Alerts User Agreement window will appear. The investor will have to click **I Accept** to move forward.
- 3 | The Alert Manager box will open and the investor will click on **Alert Subscriptions**
- 4 | The Investor will click on the **Email Management** tab and **Add New Email**.

After the investor email is added, they will be automatically signed up for the alerts available to them.





## Unsubscribing from Alerts:

- 1 | The Investor will click on the **Subscription Setup** tab.
- 2 | In the **Action** column, the Investor will select **Update** for the alert they want to unsubscribe from.
- 3 | The below box will open. The Investor will then select **Unsubscribe to this alert** and their email address will be removed from the Send To column for the alert they unsubscribed from.

Alert	Description	Subscribed	Send To	Action
Account Maintenance				
Profile Updates	Receive a notification when your profile has been updated.			Subscribe
Account Opening				
Account Successfully Opened	Get a notification that your new account is open and is ready for use.			Subscribe
Money Movement				
EFT-In Success	Find out when an electronic funds transfer into your account is processed.			Subscribe
EFT-In Failure	Receive an alert when an electronic funds transfer into your account fails.			Subscribe
EFT-Out Success	Get notified when an electronic funds transfer out of your account is processed.			Subscribe
EFT-Out Failure	Get an alert when an electronic funds transfer from your account fails.			Subscribe
EFT Standing Instructions Establishment Success	Get notified that a standing instruction you set up for an electronic funds transfer has been established.			Subscribe
EFT Standing Instructions Establishment Failure	Receive an alert that there is a problem with a standing instruction you set up on your account.			Subscribe
Transfer of Assets (TOA)				
TOA Success	Get notified when a transfer of assets (shares, funds, etc.) into your account is processed.			Subscribe
TOA Failure	Receive an alert when a transfer of assets (shares, funds, etc.) could not be completed.			Subscribe

## Go green by going paperless:

Sign up for eDelivery to simplify your recordkeeping with electronic storage of statements, trade confirmations, prospectuses, shareholder reports and other eligible correspondence. You'll receive an email letting you know that a new document is available for viewing.

- 1 | Log in to your account, select **Document Delivery Instructions** from the Service Menu.
- 2 | Click an account and select the documents you'd like to receive via eDelivery.
- 3 | Click the **Save This Account** button and the **I Agree** button to accept the terms.

With eDelivery, you can take advantage of convenient and timely email notices, instant access to your documents, enhanced security and identity theft protection and simplified recordkeeping.

Sign up for eDelivery to help simplify your recordkeeping and reduce paper clutter.

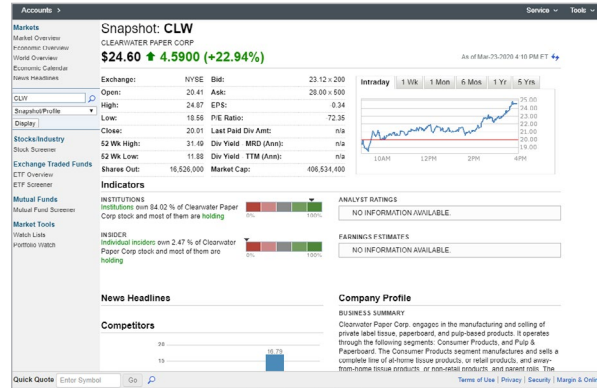
# Utilize market data and research tools:

The website offers a broad range of information you can use to track your portfolio and gain insight into market events. You have access to detailed investment profiles, comprehensive company profiles and fundamentals, and dynamic charts and analytics.

- 1 | Access **Markets & Research** through the link in the upper right-corner on our account screen.
- 2 | Select from a list of options, including market overviews and watch lists, investment quotes and fundamentals, and screeners to help you select investments.



The Market Overview screen offers you access to robust tools, including new investment screens.



The Snapshot view provides detailed company information and overview data.



All screenshots are for illustrative purposes only.

# Notes:

A series of horizontal dotted lines for writing notes.

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.

This information is as of November 30, 2018, is subject to change, and is revised periodically. Companies and trading symbols mentioned are provided for illustrative purposes only and should not be used or construed as an offer to sell, a solicitation of an offer to buy, or a recommendation for any security.

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