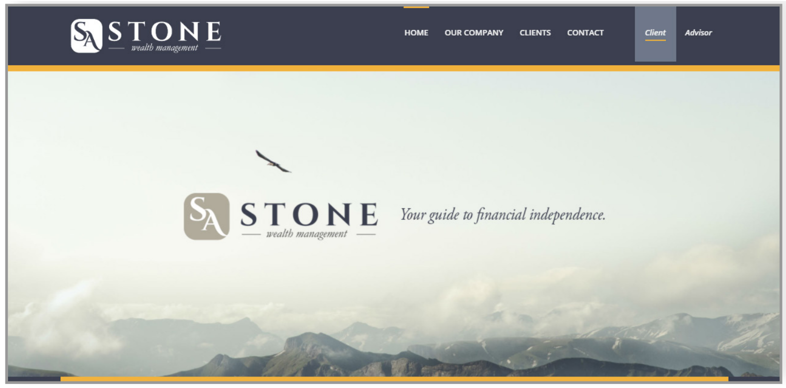
Wealth Access Portal Information

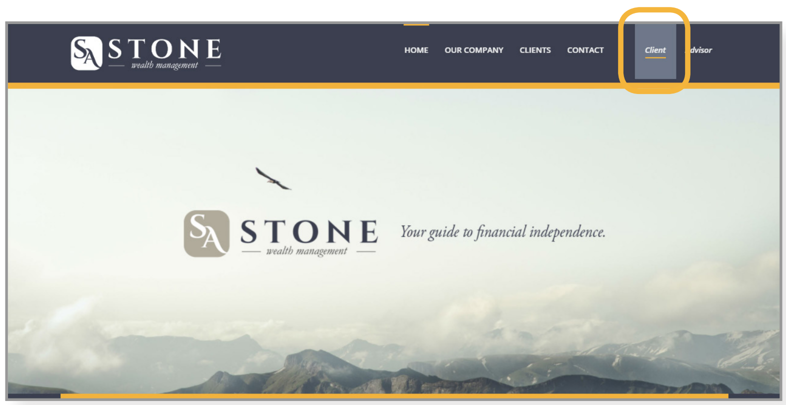
This document includes detailed instructions to:

1. Enroll for online brokerage account access
2. Elect to ‘Go Paperless’ by selecting to receive all account correspondence via electronic delivery

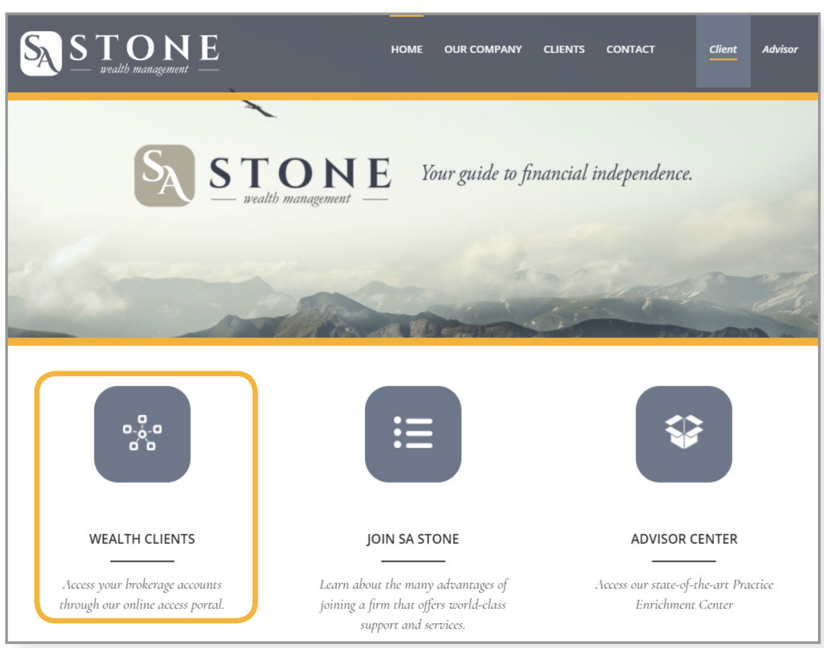
1 Go to saswealth.com



2 Click "Client" in top right of blue header bar



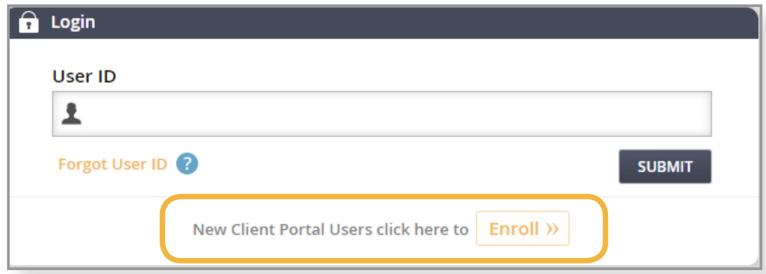
3 Click "Wealth Clients" on left side of page



Client Portal

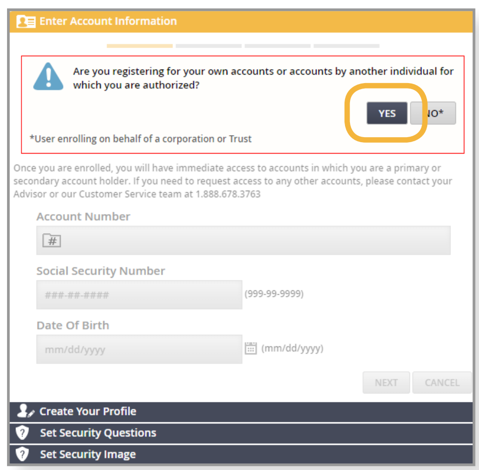
4

Click "Enroll" to enroll in your new account



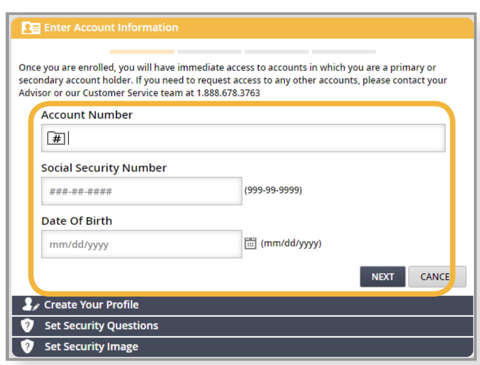
5

Under "Are you registering for..." Click "Yes"



6

Enter Account Number, Social Security Number and Date of Birth and select the NEXT button.



Wealth Access Portal Information

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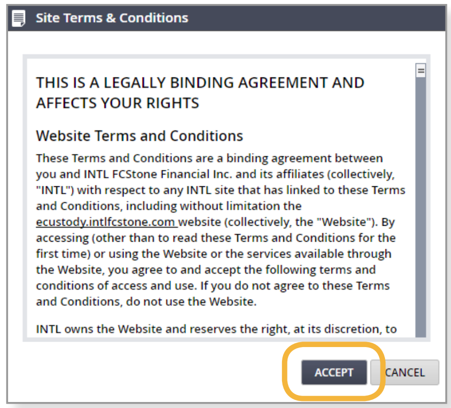
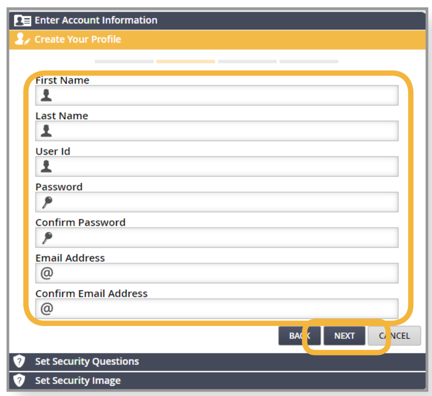
Read the Site Terms & Conditions and select the ACCEPT button.



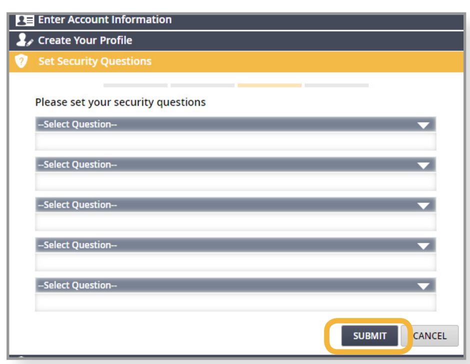
8

Complete the Enter Account Information/ Create Your Profile section and select the NEXT button.



9

Complete the Enter Account Information/ Set Security Questions section and select the SUBMIT button.



Client Portal

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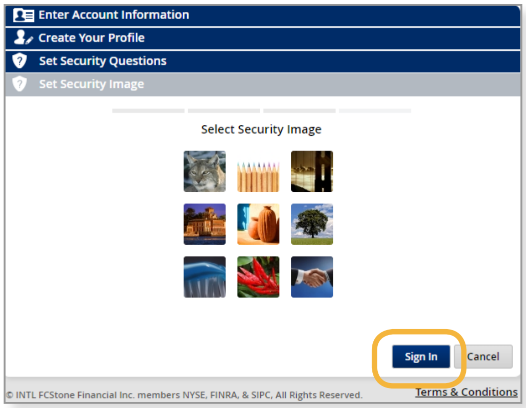
Complete the Enter Account Information/Set Security Image section and select the Sign In button.



11

Complete the Paperless Election section by selecting the Yes, Sign Me Up! Button; else select the Maybe Later link to sign in.