

GETTING STARTED WITH WEALTHSCAPE INVESTOR



Wealthscape Investor gives you 24/7 access to your account information so you are more informed and can better work with your financial professional to help you reach your goals.

Please contact your financial professional if you have any questions or need assistance.



Bookmark for easy access: <https://www.wealthscapeinvestor.com/kestra>

System Compatibility

DESKTOP COMPATIBILITY

Wealthscape Investor is certified to run using the following internet browsers and operating system:

BROWSER	OPERATING SYSTEM
Microsoft Edge 85	Windows 10
Google Chrome 86	Windows 10
Mozilla Firefox 82	MAC OS X, Windows 10
Apple Safari 13	MAC OS X
Microsoft Internet Explorer 11*.	Windows 10

* Note: While this browser is supported, not all features are optimized for use.

MOBILE COMPATIBILITY

Wealthscape Investor mobile app is also available for these devices:

MOBILE DEVICE	OPERATING SYSTEM
iPhone 5s+	Apple iOS 11+
iPad Air+	Apple iOS 11+
Android Phones	Android OS 5.x+

Register Online Today

1. Visit <https://www.wealthscapeinvestor.com/kestra> on your computer or mobile device.
2. Click on **Register**.
 - If you are re-directed to a different login screen, please check your browser security settings (see FAQ # 6)
Android/Windows: Enable cookies and delete browsing history.
3. Enter your first and last name, date of birth, and the last four digits of your Social Security Number (SSN). Click **Next**.
4. Enter your 9-digit account number. Click **Next**.
 - This can be found on your monthly account statement or by contacting your Financial Professional.
5. For extra security protection, you will need to enter a one-time code. Please select how you would like to receive the code; via text message or phone call. Click **Continue**.
6. Enter the code you received. Click **Submit**.
7. Now that your identity has been verified, you will now create a username and password. Click **Next**.
8. Congratulations, your registration was successful! Click **Return to Login Page**.
 - Please save your username and password for future logins.
9. On the login page, enter your credentials. Click **Sign In**.
10. Please read through the Terms of Use. Click **Accept**.
11. You will now be directed to Wealthscape Investor and be presented with a Security Enhancements pop-up. Please select/enter your email address and phone number. Click **Continue** and then **Submit**.

YOU ARE NOW READY TO EXPLORE WEALTHSCAPE INVESTOR!

Next Steps

1. **Go Paperless** – Electing to have your documents delivered electronically, offers you a safe and secure way to obtain your most critical documents. Enroll your accounts today by logging into Wealthscape Investor and going to **Service**, then **Document Delivery Instructions** or view the guided tour [here](#) for step-by-instructions.
Note: Only one account holder per account can enroll in eDelivery. All accounts holders can join Wealthscape Investor but only one account holder will receive the email notification that documents are ready.
2. **Create a Custom Username** – If you do not set up a custom username the first time you login, you will be automatically prompted to create one the next time. (see FAQ #8)

FREQUENTLY ASKED QUESTIONS

Q1: I received a temporary password from my financial professional and the mobile app will not let me log in. What should I do?

You will not be able to login to the mobile app with a temporary password. Please visit <https://www.wealthscapeinvestor.com/kestra> to log in and you will be prompted to create a permanent password. Once created, you may log into the mobile app.

Q2: I am trying to log into the mobile app, and I received an error message that says 'additional security configuration is required'. What does that mean?

To use the mobile app, you need to have all four security questions set-up under your username/user ID. Please navigate to an internet browser to log in and go to User Preferences, then Security Questions. Once the questions are saved, you will be able to log into the mobile app.

Q3: How do I reset my password?

From an internet browser, go to <https://www.wealthscapeinvestor.com/kestra> and click on Forgot Password. Enter either the username or user ID and click Submit. If your cell phone number is saved, you can select to receive a one-time text code. If your cell phone is not available, you will be prompted to answer your security questions. Once you pass the authentication, you will create a new password.

Q4: What does 'cannot verify user' mean when I try to register?

This error means you have previously registered for Wealthscape Investor. To obtain your existing user ID, please contact your financial professional.

Q5: I failed my security questions, and now I am blocked, what do I do?

Please contact your financial professional for further assistance.

Q6: I entered my login information and was redirected to a different Wealthscape Investor home page. What happened?

This usually happens when third-party cookies are not allowed on your internet browser. In your browser settings, either enable third-party cookies or when prompted, select allow cookies. More details on each browser are available below:

- **Chrome**
- **Microsoft Edge**
- **Firefox** (If you do not want to select Standard, select Manage Exceptions, and allow the following URLs: <https://investor.wealthscape.com> and <https://mystreetscape.com>)

Q7: I allowed cookies and I am still not able to log in, what should I do?

Clear your full browsing history in your internet browser. Depending on your history, this could take up to 5 minutes. If this step still does not allow you to login, please contact your financial professional for assistance. More details on each browser are available below:

- **Chrome**
- **Microsoft Edge**
- **Firefox**

Q8: Do I have to keep using the 10-digit user ID or can I set up a personalized one?

Yes, you can create a custom username in just a few steps.

1. Once logged in, select *User Preferences, Change Username*.
 - Refer to the on-screen guidelines for choosing a valid username.
2. In the *Enter New Username* field, enter the new username.
3. Select *Check Availability* to ensure that the username has not already been taken:
 - If the username is not available, a message displays. Repeat from step 2.
 - If the username is available, a confirmation message displays.
4. Enter the login password in the Password field.
5. Select *Next*.
6. Select *Continue* to Home Page.

Q9: I have multiple accounts linked; can I nickname them to help me identify them?

Yes. Under *User Preferences*, select *Edit My Account Name*.

Q10: How come I can only see two of my four accounts?

Wealthscape Investor will automatically link accounts with the same primary SSN/TIN. Please contact your financial professional if you cannot view all your accounts and request that they be linked. If you are a third-party, the account holder will need to sign a form to authorize your access.

