

My personal tips for setting up MyWealthscape: (a step-by-step guide with screen shots is available below:

1. Please grab a pencil and a statement before you begin. Your account number is on your statement. The registration procedure will look for your account number and a portion of your social security number to match. Once you have verified your identity, you can create a password.
2. The pencil is to jot down your password and make sure it meets the criteria listed on the screen for characters, caps, lowercase, etc.
3. After the first security question, the system will establish your USER ID, which you can immediately customize. Please write down the USER ID you choose.
4. When you are prompted to establish three more security questions, please do that immediately.

Once you have established your on-line credentials, you can establish your mail preferences for each of the categories of documents: Statements, Trade Confirmations, Correspondence and Tax Documents. You must do this for each account separately by highlighting the account and checking your delivery preference for each document type. You can opt for either postal delivery or electronic delivery for each category. Simply provide a valid email address for any documents you wish to receive electronically. You can call up any document, at any time, and print it yourself whenever you wish. If you have questions call me at (704) 502-6649. I am here for you.