

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>

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 the last four digits of your Social Security Number (SSN), first and last name and your date of birth. Click **Next**.
4. Now that your identity has been verified, you will now create your password and setup a security question. Click **Next**.
 - *If you receive an error that says, "Cannot Verify User", this means you have previously enrolled. Please go back to the main screen to login or contact your Financial Professional to obtain your user ID.*
5. Congratulations, your registration was successful! Click **Continue to home page**.
 - *Please save your user ID and password for future logins.*
6. Please read through the Terms of Use. Once reviewed, check the Accept box and click **Next** to proceed. A status bar at the top indicates steps which have been completed.
7. 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**.

Next Steps

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.

System Compatibility

DESKTOP COMPATIBILITY

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

BROWSER	OPERATING SYSTEM
Microsoft Edge 113	Windows 10
Google Chrome 113	Windows 10
Mozilla Firefox 113	MAC OS X, Windows 10
Apple Safari 16.3	MAC OS X

MOBILE COMPATIBILITY

Wealthscape Investor mobile app is also available for these devices:

MOBILE DEVICE	OPERATING SYSTEM
iPhone 6S+	Apple iOS 13+
iPad Air+	Apple iOS 13+
Android Phones	Android OS 10

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 click on Forgot Username? on the login screen or 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.

