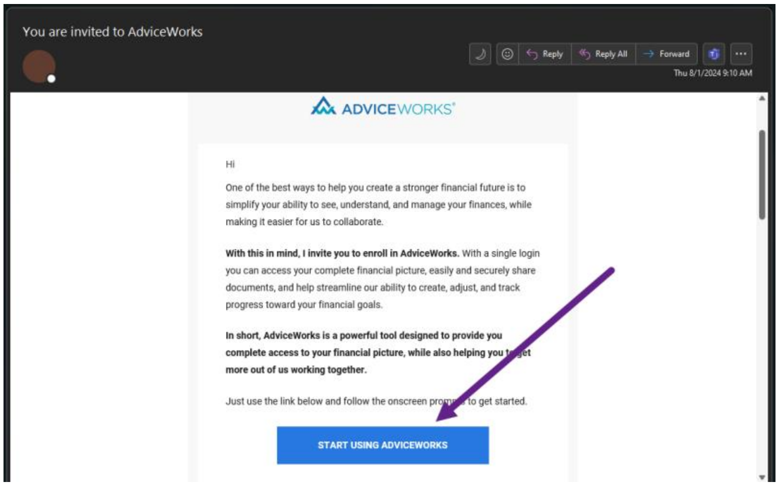
How to Register for AdviceWorks

AdviceWorks simplifies how you see, understand, and manage your finances, and makes it easier for you and your financial professional to work together. It's a powerful tool to help you pursue your financial goals. There's no better time than now to start using all it has to offer.

1. Your financial professional will send you an enrollment email that contains a link to the registration site. Locate the email and click **Start Using AdviceWorks**.


You are invited to AdviceWorks

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ADVICEWORKS

Hi

One of the best ways to help you create a stronger financial future is to simplify your ability to see, understand, and manage your finances, while making it easier for us to collaborate.

With this in mind, I invite you to enroll in AdviceWorks. With a single login you can access your complete financial picture, easily and securely share documents, and help streamline our ability to create, adjust, and track progress toward your financial goals.

In short, AdviceWorks is a powerful tool designed to provide you complete access to your financial picture, while also helping you to get more out of us working together.

Just use the link below and follow the onscreen prompts to get started.

START USING ADVICEWORKS

2. *Let's get started:* Choose **Enroll**
3. *Extra security step:* To help verify you as the owner, we will send you text message with a 6-digit security code. Click **Next**.
4. *We sent you a text:* Upon receipt of the text message, enter the 6-digit code and click **Next.**
5. *Create your password:* Create a password for your account. Check marks on the right-hand side will indicate when each password requirement is satisfied. Click **Submit**.
6. *You're enrolled:* Congratulations, you are enrolled! Click **Continue**.
7. *Terms of use:* Review the links provided, then click **I Agree**.

Save Time and Go Green with Electronic Delivery!

Enrolling in eDelivery prevents paper delivery of regulatory and account documents sent by Cetera. If you want to receive future documents electronically, choose **I Agree! Enroll Me**.

The AdviceWorks Client Access App is Here!

AdviceWorks offers the convenience of 24/7 account access from your mobile device. Use the QR code to download the app, or search **AdviceWorks Client Access** from the App Store or Google Play.

Download on the App Store | GET IT ON Google Play

Click **Okay, I Got It.** This will bring you to the AdviceWorks home page, where you can view account information, access electronic documents, and so much more. Welcome to AdviceWorks!

08/24