CAMBRIDGE

For further assistance please call and ask for Wealthscape at (888) 245-0452

Wealthscape Investor: Navigation

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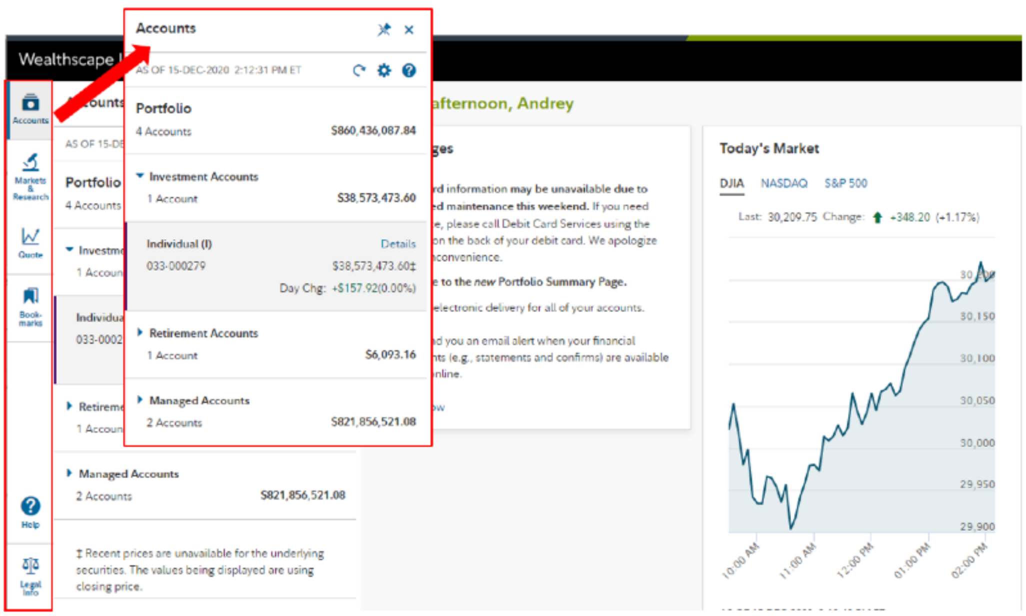
Accounts Panel: Select an Account

When you first sign into wealthscapeinvestor.com/cir, the Accounts Panel to the left of the application window provides a persistent view of your investment portfolio. This view includes individual account values and the total value for all accounts.

Accounts Panel

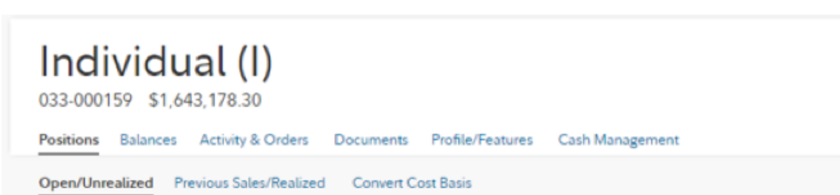
Clicking **Details** from the Accounts Panel puts the account in context. Tabs allow easy access to account specific information, such as Documents and Profile/Features.

- The Accounts Panel, which provides a persistent view of the account holder's investment portfolio at the individual account, account grouping, and overall total, will be open and pinned by default. Users can unpin and close the Accounts Panel to maximize the application window.
- Users can expand and collapse segments of accounts (ex. Retirement Accounts). Select **Details** to access information specific to that account.
- The total account value is now readily viewable with an account in context



Tabs

Use the tabs to navigate to other account-related windows, such as **Positions, Balances**, and **Activity & Orders** for the currently selected account. Redesigned tabs allow easy navigation to other account-related windows such as **Documents**.

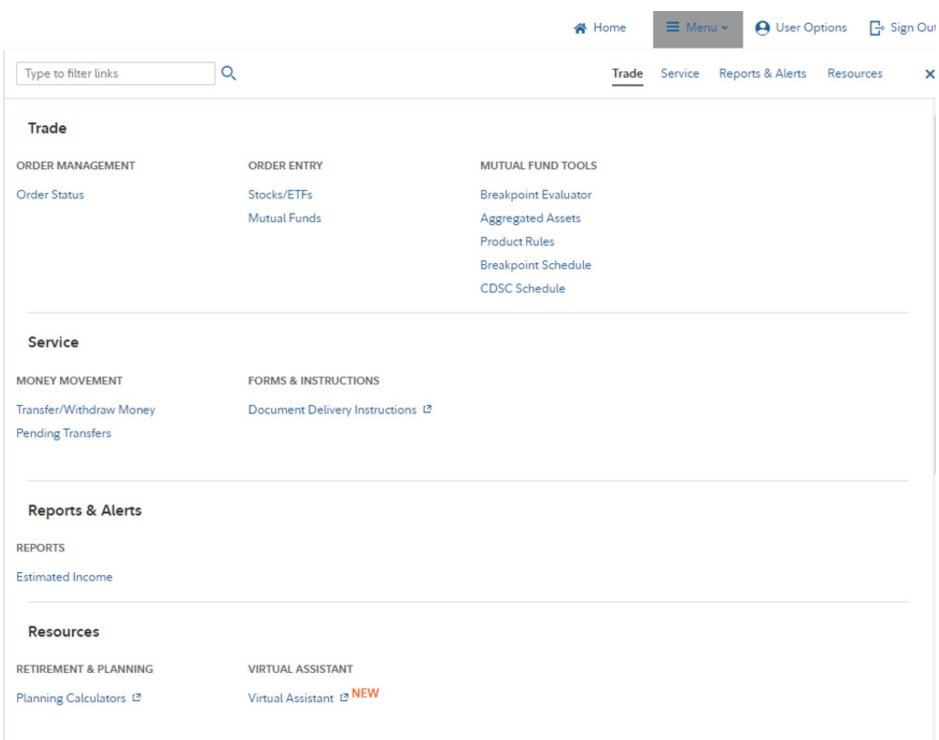


Menu Bar: Navigate to Other Features

After an account is selected and in context, use the menu bar above the window area to access order entry tickets, money movement capabilities, reporting features, research tools, etc.

Important: Menus and menu options that display are limited to those to which a User ID is entitled.

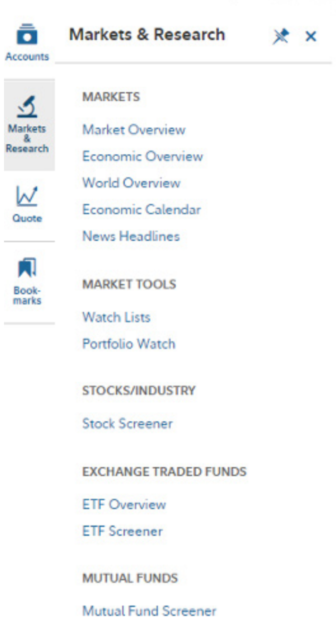
A. **Trade:** Find order-related windows, including order management (Order Status), order entry tickets, and mutual fund tools
    a. **NOTE:** The trading functionality is only available when requested by your financial professional
B. **Service**: Sign up for e-mail notification when account documents are available online (Document Delivery Instructions) or to transfer or withdrawal money
    a. **NOTE:** Money Movement functionality is only available when requested by your financial professional
C. **Reports & Alerts:** Access a report estimating the future monthly cash flow in one or more accounts for the next 12 months (Estimated Income)
D. **Resources:** Access Planning Calculators for Education Funding, RMDs, Virtual Assistant, etc.



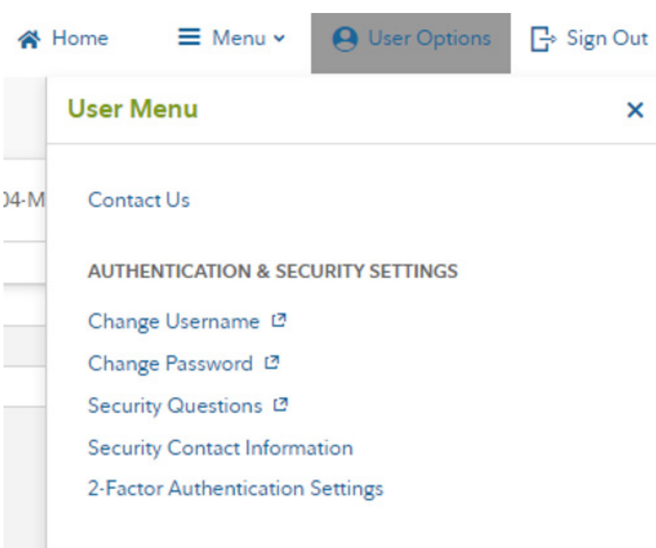
Side Bar: Navigation Markets & Research with Quotes

E. Markets & Research: Explore tools that enable you to retrieve Market or Economic Overview, news, headlines, and create watch lists and screeners

F. Quote: Enter symbols for security information



G. User Preferences: Select User Preferences above the Menu bar to access user settings



If you have questions, please contact your financial professional.

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1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080

*Please note: If you do not sign up for paperless statements, they will be delivered to you via U.S. Mail. You will need to complete the same steps for all of your accounts. If at anytime after consenting to the electronic notification program you wish to receive a paper copy of a document made available to you for online viewing, you will need to request the paper copy from Cambridge.