

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

Wealthscape Investor New User Registration and Paperless Sign-up Guide

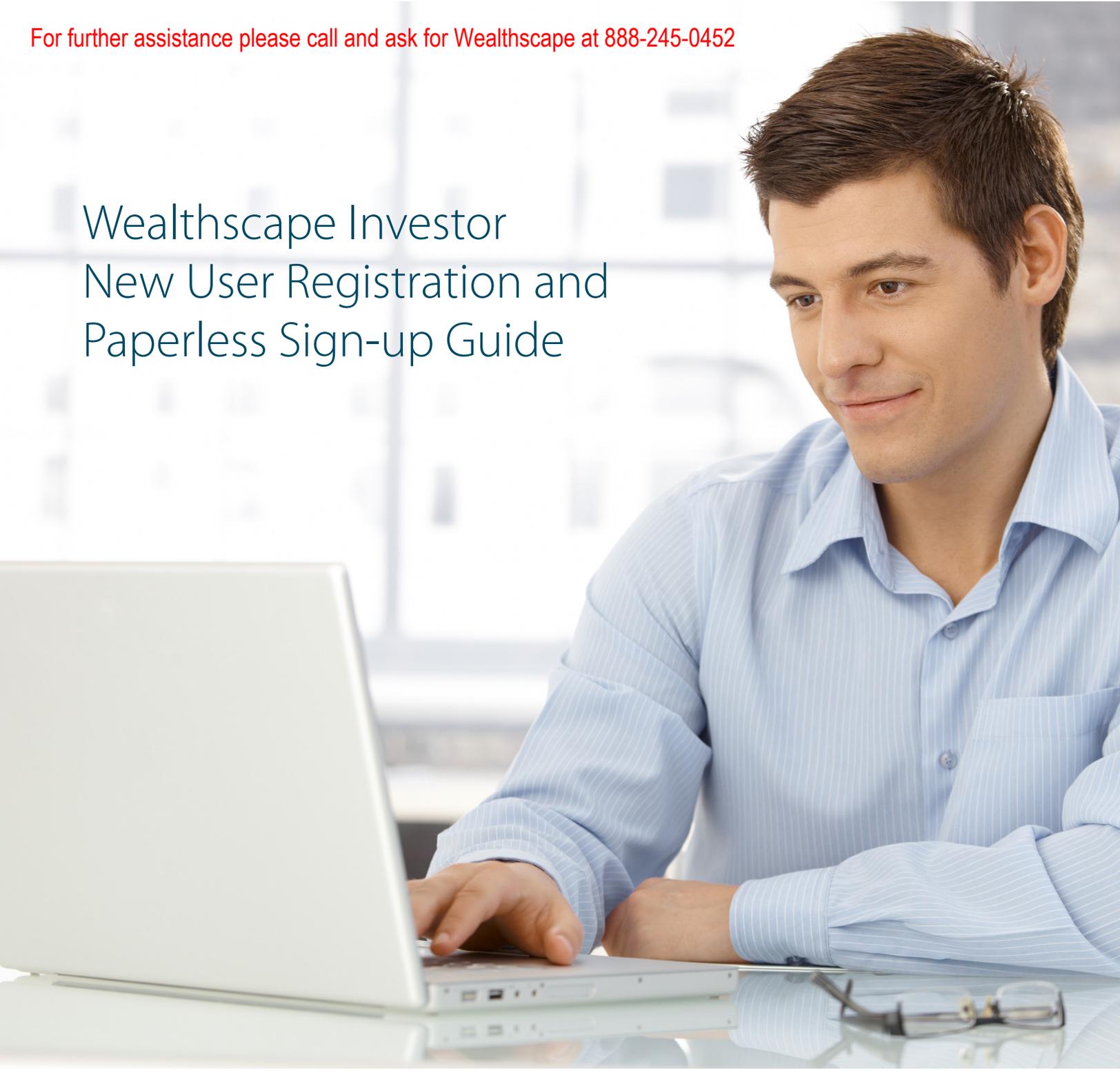


Table of Contents

New User Registration – User Created 3

New User Registration – Cambridge Created 5

Go Paperless 7

Forgot/Reset Password 9

New User Registration – User Created

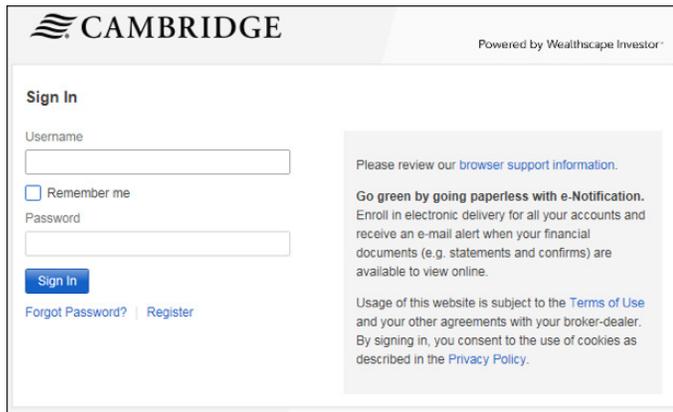
Wealthscape Investor New User Registration

The Wealthscape InvestorSM new user registration function allows you to register for access to Wealthscape Investor on your own. After registering, you will be able to access your brokerage account online and have the option to go paperless by signing up for e-notification. In order to register for Wealthscape Investor, you must have an active brokerage account with Fidelity Clearing & Custody SolutionsSM (FCCS) and have a Social Security number (SSN).

After registering, you will have access to all accounts on which you are listed as a holder. If you open new accounts, they will automatically be linked to your investor ID. All account holders listed on joint or trust accounts will have the ability to register for Wealthscape Investor access.

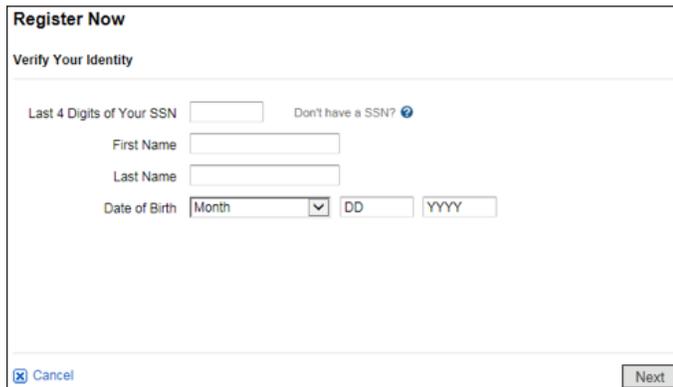
How to Register for a Wealthscape Investor ID

- Go to www.wealthscapeinvestor.com/cir. Click the **Register** link on the Login Page.



The screenshot shows the Cambridge Wealthscape Investor Sign In page. At the top left is the Cambridge logo, and at the top right, it says "Powered by Wealthscape Investor". The main heading is "Sign In". Below this, there are input fields for "Username" and "Password". A "Remember me" checkbox is located between the fields. A blue "Sign In" button is positioned below the password field. Below the button are links for "Forgot Password?" and "Register". To the right of the input fields, there is a grey informational box containing the following text: "Please review our [browser support information](#). Go green by going paperless with e-Notification. Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online. Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#)."

- Enter the last four digits of your SSN, your first and last name, your date of birth, and click **Next**



The screenshot shows the "Register Now" page with the heading "Verify Your Identity". It contains several input fields: "Last 4 Digits of Your SSN" (a text box), "First Name" (a text box), "Last Name" (a text box), and "Date of Birth" (a dropdown menu for "Month", followed by "DD" and "YYYY" text boxes). A link "Don't have a SSN?" with a question mark icon is located to the right of the SSN field. At the bottom left is a "Cancel" button with a close icon, and at the bottom right is a "Next" button.

- Enter the account number you wish to access and click **Next**

Register Now

Verify Your Identity

Enter Your Account #

- Create and verify your new password
- Select a security question and type your answer in the box below. Then, re-enter your answer and click **Next**.

Register Now

✓ Verify Your Identity | **Register** | Confirmation

Create New Password

Retype New Password

Password Strength: Weak

Password Guidelines
Your password must be 6-20 characters and include 3 of the following:
Number
Special character
Capital letter
Lowercase letter

Note: You may not reuse a previous password.
What is a strong password?
To create a strong password, Fidelity recommends your password include the following:
At least one special character: % ^ () + , . - / ; = ? \ * _ | ~ ! \$ @
No easily recognized sequences (e.g., 12345 or 11111)
No personally identifiable information (e.g., Social Security Number, telephone number, or date of birth)
Example of a strong password:
KingHenryThe8%^(

Create Your Security Question
If you need to reset your password, you will be asked your security question to verify your identity.

Security Question

Answer

Re-enter Answer

- The confirmation window will display when your registration was successful

Register Now

✓ Verify Your Identity | ✓ Register | **Confirmation**

Your registration was successful.

User ID

Note: Please record your User ID for future use. You will be required to enter this User ID and your password every time you log in to your account.

[Continue to home page](#)

- Print the confirmation page by clicking the **Print** icon
- Click **Continue to home page** to proceed directly to the page that contains all your accounts information

New User Registration – Cambridge Created

If you wish to have Cambridge complete your new user registration for Wealthscape Investor, please contact your advisor who will fill out a Wealthscape Investor Authorization Form.

Once your user registration is created, Cambridge will email your username and password to your advisor who will be responsible for emailing that information to you. Once registered, you will be able to access your brokerage account online and have the option to go paperless by signing up for e-notification. In order to register for Wealthscape Investor, you must have an active brokerage account with FCCS and have an SSN.

Log In

Go to www.wealthscapeinvestor.com/cir and enter your username and password that was provided by your advisor and click **Sign In**.

CAMBRIDGE Powered by Wealthscape Investor

Sign In

Username

Remember me

Password

[Sign In](#)

[Forgot Password?](#) | [Register](#)

Please review our [browser support information](#).

Go green by going paperless with e-Notification.
Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online.

Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#).

Add Security Questions

Once logged in, you will be prompted to enter security questions for your username. Click **Add Security Questions**. If you click **Skip Questions for Now**, the next time you log in, you will be required to add a security question.

Help Us Protect Your Login Experience

Your security is our priority. To further safeguard your login experience, we are requiring all customers to create security questions/answers.

How it Works

- You add security questions and answers to enhance the security of the login experience.
- We may prompt you with one of these questions if unusual login behavior is detected.

What You Need to Do

- Choose three security questions and create answers known only to you.

Note that if you prefer not to add your security questions at this time, you'll be required to do so the next time you log in.

[Skip Questions for Now](#) [Add Security Questions](#)

All links open in a new window.

About Security Questions

- [Why is my online experience changing?](#)

After you have selected your security questions and provided your answer, click **Submit**

Add Your Security Questions & Answers

Security Guidelines

- Answers must be between 3 and 31 characters
- Answers can contain both letters and numbers
- Special characters, such as & and !, are not allowed
- Answers are not case sensitive
- Choose questions with clear answers that you can easily remember

Add Security Questions & Create Your Answers

These may be used to further verify your identity during log in.

All fields are required.

Question:

Answer:

Repeat Answer:

Question:

Answer:

Repeat Answer:

Question:

Answer:

Repeat Answer:

Do you frequently use this computer to access this web site?

Yes

No

Note: If you are using a public computer, you should always select No.

The confirmation window will display when your security question was successful, click **Next**

Confirmation: Your security questions are now in place.

✔ Congratulations! Your login experience has been updated with enhanced security.

To make any changes to your security questions and answers, go to User Options.

The user agreement will appear after completing your security questions. Once you have read the terms, click **Accept** at the bottom of the screen.

Terms of Use > User Agreement

END-USER AGREEMENT

1. Cambridge Investment Research, hereby grants you a nonexclusive, nontransferable license for the term of this Agreement to access and use, Company internet-based securities trading services, as may be amended from time to time (the "Product"). The Product is available through the World Wide Web with protocol of the Internet, and allows you to obtain information concerning your brokerage account with Company, enter orders in such account to buy and sell certain securities, stock options and mutual funds, and execute orders and other information (some of which may be provided by third parties). You agree not to assign, sublicense or otherwise convey or transfer your rights under this Agreement to another person or entity. Though orders are usually routed to the marketplace within seconds, certain orders, at Company's sole discretion, may be subject to manual review and entry, which may cause delays in the processing of your orders. You also understand that you will receive the price at which your order executes in the marketplace, which may be different from the price at which you entered or the price at which your order is entered into the Product. When you place a request to cancel an order, the cancellation of that order is not guaranteed. Your order will only be canceled if your request is received in the marketplace and marked up with your order before your order execution. Market orders are subject to immediate execution. During market hours, it is rarely possible to cancel your market order. Please do not assume that any order has been executed or canceled and you have received a transaction confirmation from Company. Also, please be aware that Company, from time to time, receives late reports from exchanges and market makers reporting the status of transactions, accordingly, you will be subject to late reports related to orders that were previously unreported to you or reported to you as being executed, canceled, or executed. In addition, any reporting or posting errors, including errors in execution prices, will be corrected to reflect what actually occurred in the marketplace.

2. You shall be the only authorized user of the Product under this Agreement. Data, information and services accessible through the Product may be displayed, reformatted and printed for your personal, noncommercial use only. You agree to keep confidential and not cause or permit such data, information or services to be published, broadcast, retransmitted, reproduced, commercially exploited or otherwise re-disseminated. You agree not to create any derivative works (including databases) based on the Product or any data, information or services contained therein.

3. You understand that all the terms and conditions of your Customer Account Agreement with Company and Company's Agreement with its clearing agent, National Financial Services Corp. (the "Clearing Agent"), including their print and online versions, if applicable and any applicable principles, control the operation of your account hereunder and those terms and conditions are incorporated herein by reference. You acknowledge the Product may involve the transmission to you of information that may be considered personal financial information, including but not limited to the identity and number of shares that you trade and the net dollar price for the shares. You acknowledge that Company cannot assure the security of electronic transmission of such information over the Internet. You consent to the transmission by electronic means of such information through the Product, such consent shall be effective at all times that you use the Product.

4. Your use of the Product requires your receipt from Company and use of a unique identification number ("ID") and associated password ("Password"). You hereby agree to maintain your ID and Password in strict confidence. You understand that you shall be solely responsible for all actions entered through the Product using your ID and Password. Company may at all times rely upon and act in accordance with any instructions or requests, written or oral, electronic or otherwise, all instructions communicated to us using your ID and Password will be considered to have been sent by you. Due to the nature of the Internet, the limited security mechanisms associated with the Product and the inherent limitations of such mechanisms, Company cannot ensure the privacy, security or authenticity of our communications with the Product, accordingly, you must assess whether the use of the Product or the Internet is acceptable to meet your particular needs. Further information on this topic may be obtained from Company. The site and storage of any information, including without limitation, the ID, the Password, portfolio information, transaction activity, account balances, and any other information or data available on your personal computer, is at your own risk and is your responsibility. You are responsible for providing and maintaining the communications equipment (including personal computers and modems) and telephone or other remote services required for accessing and using the Product and for all communications service fees and charges incurred by you in accessing the Product.

Your Wealthscape Investor account homepage will appear. To view your accounts, click **Accounts** in the top left corner of the screen. On the Accounts page, you will find a general overview of each account associated with your username.

Wealthscape Investor | **CAMBRIDGE**

Help | Settings | Contact Us | Log Out

Accounts | Trade | Service | Reports | Market & Research | Resources

As of 14 Jul 2017 10:05 AM ET

Investment Accounts

Corporation (CP)

Inc.

Corporation (CP)

Corporation (CP)

Recent prices are unavailable for the underlying securities. The values being reported are using closing prices.

Portfolio Summary

Messages

Go paperless! Email in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirmations) are available to view online.

Latest Market News

Major Market Indices

DJI: +0.05% | NASDAQ: +0.12% | S&P 500: +0.17%

21,563.54 | 10:45 (0.05%) | 21,800

DJI Performance

1 Day: 1.29 | 1 Month: 1.05 | 1 Year: 13.31

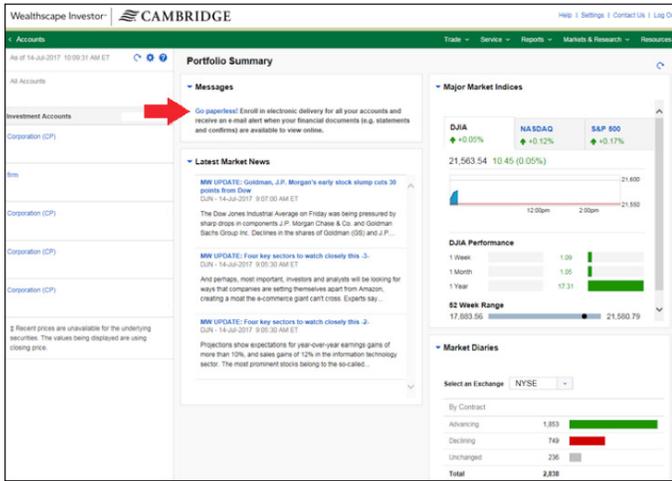
52 Week Range: 17,853.06 - 21,000.79

Market Diaries

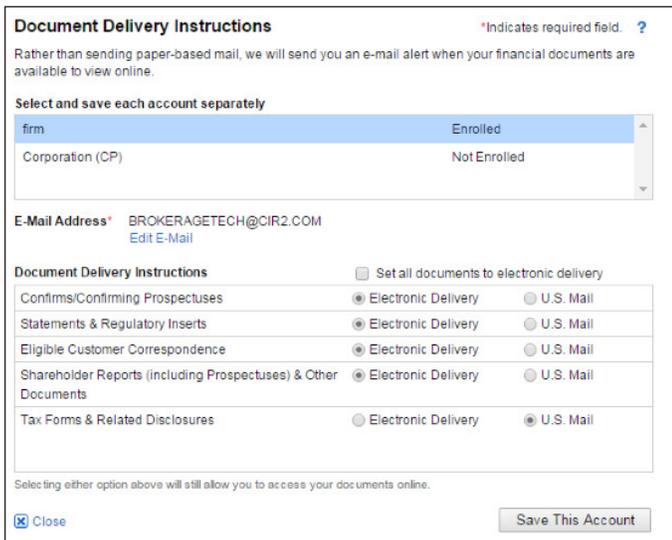
Go Paperless

You can enroll in electronic delivery (eDelivery) for all accounts. Wealthscape Investor will send an email alert when financial documents (e.g., statements and confirmations) are available to view online.

To sign up for paperless options, click **Go paperless!**



Under Document Delivery Instructions, select the circle next to **Electronic Delivery** for each account you would like eDelivery setup with. If you'd wish to setup eDelivery for all account, select the box next to **Set all documents to electronic delivery**. Once you have selected your options, click **Save This Account**.



Add or Edit Email Address

On the same screen, if you wish to add or edit your email address, click **Edit E-Mail**.

The screenshot shows the 'Document Delivery Instructions' form. At the top, it states: 'Rather than sending paper-based mail, we will send you an e-mail alert when your financial documents are available to view online.' Below this, there is a section titled 'Select and save each account separately' with a table showing 'firm' as 'Enrolled' and 'Corporation (CP)' as 'Not Enrolled'. The 'E-Mail Address' is listed as 'BROKERAGETECH@CIR2.COM' with an 'Edit E-Mail' link. A 'Document Delivery Instructions' section contains several rows with radio buttons for 'Electronic Delivery' and 'U.S. Mail'. At the bottom, there are 'Close' and 'Save This Account' buttons.

Enter your email address in both boxes and click **Apply** in the bottom right corner of your screen. The box will disappear, bringing you back to the Document Delivery Instructions box.

The screenshot shows the 'Add E-Mail' dialog box. It contains the following fields: 'Account Holder' (a dropdown menu showing 'DOE, JOHN'), 'E-Mail Address' (a text box containing 'BROKERAGETECH@CIR2.COM'), and 'Verify E-Mail Address' (a text box also containing 'BROKERAGETECH@CIR2.COM'). There are 'Cancel' and 'Apply' buttons at the bottom.

Electronic Notification Agreement

Per SEC regulations, a client must give informed consent to stop the mailing of paper statements and confirmations. Due to these regulations, the client must read and accept the license agreement.

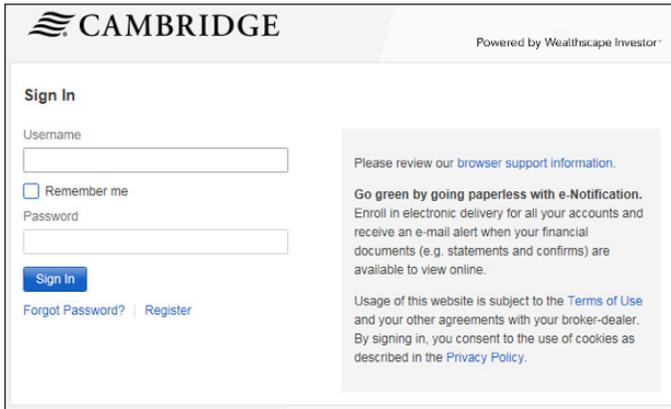
The screenshot shows the 'Electronic Notification Agreement' dialog box. It features a warning icon and text: 'Warning: In order to sign up for online delivery of account documents, you must read and accept the agreement below.' Below this is a scrollable area containing the 'Electronic Delivery Agreement' text. At the bottom, there are two buttons: 'I do not agree' and 'I agree'.

After accepting the Electronic Notification Agreement, you will return to the main page. Please confirm that your settings are correct.

You are now set up to receive eDelivery. You will receive electronic email notifications which will include a link or URL where the document(s) can be accessed, viewed, and printed. You will be provided with instructions on how to access the documents.

IV. Forgot/Reset Password

If you have forgotten your password or wish to reset your password, visit wealthscapeinvestor.com/cir and click **Forgot Password?**

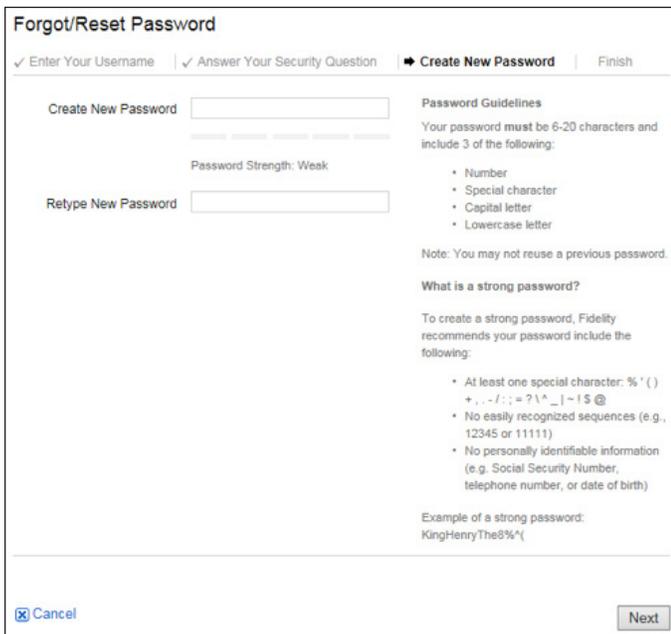


The screenshot shows the Cambridge Sign In page. At the top left is the Cambridge logo. To the right, it says "Powered by Wealthscape Investor". Below the logo is the "Sign In" heading. There are two input fields: "Username" and "Password". Below the Username field is a checkbox labeled "Remember me". Below the Password field is a blue "Sign In" button. To the left of the button are links for "Forgot Password?" and "Register". On the right side of the page, there is a grey box containing text: "Please review our [browser support information](#). Go green by going paperless with e-Notification. Enroll in electronic delivery for all your accounts and receive an e-mail alert when your financial documents (e.g. statements and confirms) are available to view online. Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#)."

Enter your username and click **Next**.

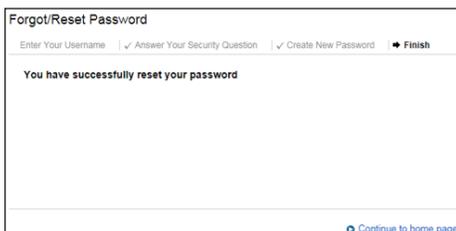
Answer your security question and click **Next**.

Create and verify your new password and click **Next**.



The screenshot shows the "Forgot/Reset Password" process at the "Create New Password" step. At the top, there are four progress indicators: "Enter Your Username" (checked), "Answer Your Security Question" (checked), "Create New Password" (active), and "Finish". Below the progress indicators are two input fields: "Create New Password" and "Retype New Password". To the right of the input fields is a "Password Strength: Weak" indicator. Further right is the "Password Guidelines" section, which states: "Your password must be 6-20 characters and include 3 of the following: Number, Special character, Capital letter, Lowercase letter." Below this is a note: "Note: You may not reuse a previous password." Underneath is the heading "What is a strong password?" followed by a list of recommendations: "At least one special character: % ' () + , . - / : ; = ? \ ^ _ | ~ ! \$ @", "No easily recognized sequences (e.g., 12345 or 11111)", and "No personally identifiable information (e.g. Social Security Number, telephone number, or date of birth)". Below the list is an example of a strong password: "KingHenryThe8%^{". At the bottom left is a "Cancel" button and at the bottom right is a "Next" button.

The confirmation window will display when your new password was created successful, click **Continue to home page**.



The screenshot shows the "Forgot/Reset Password" process at the "Finish" step. At the top, there are four progress indicators: "Enter Your Username" (checked), "Answer Your Security Question" (checked), "Create New Password" (checked), and "Finish" (active). Below the progress indicators is a message: "You have successfully reset your password". At the bottom right is a link: "Continue to home page".



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 any time 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. Member FINRA/SIPC. V.CIR.0917