



How to obtain Albridge Online Account Access

1. Once your accounts are set up and funded, you will receive an email with a link to follow and instructions on how to set up your online access. The email will look something like this:

From : customerservice@albridge.com
Subject : Invitation for Online Access
To : Youremail@yourdomain.com
Reply To : jay@allset2retire.com

Dear [Investor Name],

Your advisor would like to provide you with access to your consolidated financial reports. Please perform the following actions:

1. Click this link to register or use this URL:
https://wm.mainaccount.com/WebApp/stmt/NSRServ?command=INVREGISTER&siteId=134_sai
2. Please use the following Access Code when prompted: XXXXXX (This code will expire in 24 hours)
3. Review the User Agreement and click the appropriate button at the bottom of the screen
4. Create your User Name and Password as well as complete your profile information

2. Click on the link and you will be redirected to the Albridge Solutions site. You will then be prompted to enter your social security number and the access code provided in the email.

The screenshot shows the Albridge online account access registration form. At the top left is the Albridge logo with the tagline "Wealth Reporting". A progress bar at the top indicates four steps: 1. SSN & Access Code (current step), 2. User Agreement, 3. Personal Info, and 4. Review and Submit. The main content area prompts the user to "Please enter your Social Security Number and Access Code:". There are two input fields: "Social Security Number:" with a small "(4- 111223333)" next to it, and "Access Code:". An arrow points from a text box on the right to the Social Security Number field. At the bottom, there are "Cancel" and "Next" buttons.

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SSN & Access Code User Agreement Personal Info Review and Submit

1 2 3 4

Please enter your Social Security Number and Access Code:

Social Security Number: (4- 111223333)

Access Code:

Enter your Social Security Number and Access Code and then click next.

Cancel Next

3. You will then need to accept the terms and click continue.

The screenshot shows the 'User Agreement' step of a four-step registration process. The progress bar at the top indicates that the first step, 'SSN & Access Code', is complete, and the current step is 'User Agreement'. Below the progress bar, there is a heading 'Please read the User Agreement and if acceptable select the Accept button.' followed by a large text area containing the terms and conditions. At the bottom of the page, there are two buttons: 'Cancel' and 'Accept >'. The 'Accept >' button is highlighted with a blue rectangular box.

4. On the following page, enter your desired User Name, Password, and confirm your Password again. Then enter your personal information. Once you have completed entering your information, click "Review and Submit"

The screenshot shows the 'Personal Info' step of the registration process. The progress bar at the top shows that the first two steps, 'SSN & Access Code' and 'User Agreement', are complete, and the current step is 'Personal Info'. The page is divided into several sections: 'Please select a User Name and Password' with input fields for 'User Name', 'Password', and 'Confirm Password'; 'Please enter the following personal information' with fields for 'Prefix', 'Last Name', 'First Name', 'Middle Initial', 'Suffix / Designation', 'Day Phone', 'Evening Phone', 'Fax', 'E-Mail', 'Address', 'Address 2', 'City', 'State', 'Zip Code', and 'Date of Birth'; 'Registration FAQs' with a list of instructions; 'User Name Requirements' with a list of criteria; 'Password Requirements' with a list of criteria; and 'Questions?' with a note to contact a financial advisor. At the bottom, there are three buttons: '< Previous', 'Cancel', and 'Review & Submit >'. The 'Review & Submit >' button is highlighted with a blue rectangular box.

5. On the next page, confirm the information you entered and click “Submit.”
Or click “Previous” to go back and update your information.
6. Once you click Submit, you will receive the message that you Registration was successful! You will then be taken back to the login page, where you can log in using your User ID and Password.

✓ Registration Successfully.

Next Step

- You will be able to login and use our service now. Please save this URL in your favorites: <https://wm.mainaccount.com/>
- If you have any question, please reach out to your financial advisor for assistance.

OK

NOTE: Be sure to bookmark the website for future use! You can also access Albridge through Retirement Visions' website at www.allset2retire.com

If you have any questions or run into any problems when setting up your Albridge access, please call our office at 860.899.1280 and we would be happy to assist you!