

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: <u>https://wm.mainaccount.com/WebApp/stmt/NSRServ?command=INVREGISTER&siteId=134_sai</u>
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.

SSN & Access Code	User Agreement	Personal Info	Review and Submit
Please enter your Social Security Number and Access Code: Social Security Number :	•		Enter your Social Security Number and Access Code and then click next.

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

SSN & Access Code	User Agreement	Personal Info	Review and Submit
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ease read the User Agreement and if acceptable select the Accept but	ton.		
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In no event will Albridge, Albridge Solutions or third party information provid	ders be held liable to any party or any direct, indirect, special or other conseque	ntial damages for any use of this web site, or on any other hyperlinked web si	te, including, without limitation, any lost profits, business

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"

	33N & Access Code	Usar Agreement	Personal Info	Review and Submit
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ase select a User Nam	e and Password.	Registration FAQs		
r Name:*		 All fields marked with a sateriak (*) are required and must be entered. 		
word.*		Please enter the information requested with care as the information you enter at this point will carry to your performance	oe reporta.	
im Password:*		User Name Requirements		
		Must be between 8 and 20 characters.		
(User Name and Paseword can be Alginarymetic and must be 6-20 charactere)		 Must contain at least one numeric and one alphabetic character; 		
Please enter the following personal information.	Must not contain special characters.			
fin .	Select 🐨	Must not contain the last 4 digits of your Social Security Number: Must be different from the previous username.		
Name: *				
t Name: *		Password Requirements		
		Must contain a minimum of 6 characters. Must contain at least one numeric and one alphabetic character.		
Sle Initial		Must be different from your User Name.		
ix / Designation		Must be different from your previous five(5) passwords.		
Day Phone: *				
ning Phone		Questions? • If you have any questions, please reach out to your financial advisor.		
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		Gancel		Review &

- 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.

C Registration Successfully				
xt Step				
You will be able to login and use our service now. Please save this URL in your favorities: https://wm.mainaccount.com/ If you have any question, please reach out to your financial advisor for assistance.				

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

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!