



# WEALTHSCAPE INVESTOR ONLINE ACCESS

## Registration and User Guide

### [About](#)

Use this user guide to set up your Wealthscape Investor Online account. This guide also covers how to change/reset your password, and how to create a custom username for your online account.

# Wealthscape Investor: ID's, Passwords, and Usernames

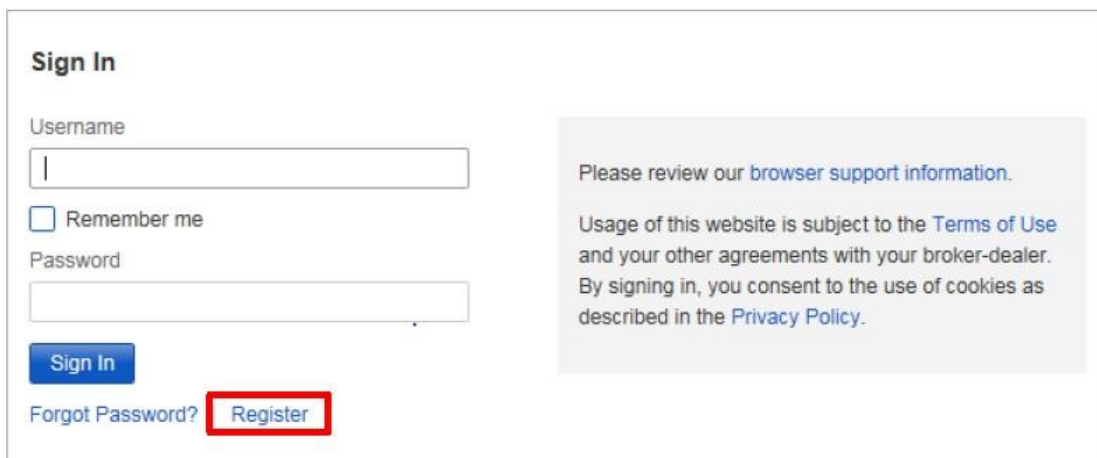
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## Register for a New User ID

This portion will help you set up your User ID into Wealthscape Investor. ***Before proceeding, please be sure to have your active National Financial Services brokerage account number available.***

1. First open your preferred internet browser and type, <https://investor.wealthscape.com>. On the Wealthscape Investor Login page, select **Register**.



**Sign In**

Username

Remember me

Password

[Forgot Password?](#)

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

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](#).

The **Register Now** window will pop up asking for your identity information.



**Register Now**

Verify Your Identity

Last 4 Digits of Your SSN  [Don't have a SSN?](#)

First Name

Last Name

Date of Birth

2. Enter the following:
  - a. Last four digits of your Social Security number (SSN)
  - b. First and Last Name
  - c. Date of Birth
3. Once you have input your information, select **Next**.
4. Enter your nine-digit Wealthscape Investor account number and select **Next**.
5. Enter a new password by following the Password Guidelines, and then select a security question and answer (SQA) information.
6. Select **Next**.

A confirmation window states that the registration was successful and provides the 10-digit user ID. If you wish, you can print this page by selecting the **Print** icon.

7. Select **Continue to Home Page** to proceed directly to the landing page.

### Change a Password

If you wish to change your password that is associated with your User ID, please follow these directions.

**Note: You have up to 5 attempts to enter the correct password when logging into Wealthscape Investor. After the fifth failed attempt, the password becomes deactivated.**

**If the password becomes deactivated, you will have to contact Westminster Financial to have the password reset.**

1. Select **Settings > Change Password**.
2. In the Enter Current Password box, enter the password used to log in for the current session.

The screenshot displays a password change form with the following elements:

- Enter Current Password:** A text input field.
- Create New Password:** A text input field.
- Retype New Password:** A text input field.
- Password Strength:** A progress bar showing the strength of the new password, currently labeled as "Weak".
- Password Guidelines:** A section with a red border containing the following text:
  - Your password must be 6-20 characters.
  - 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%^(
- Next:** A button at the bottom right of the form.

3. In the Create New Password box, enter a new password that conforms with the Password Guidelines.
4. In the Retype New Password box, enter the new password again.
5. Select **Next**.

*A message confirms that the password has been successfully changed. After this, you must use this password next time you log in to Wealthscape Investor.*

### Change a Username

You can create a custom username to represent your 10-digit user ID for use in logging into Wealthscape Investor and Wealthscape Investor Mobile Apps.

**Note:** *Once you create a custom username, you will be required to login using Wealthscape Investor Login page; Mobile App users will be required to download and login with the new Wealthscape Investor App.*

1. Select **Settings > Change Username**.  
*You can refer to the on-screen guidelines for choosing a valid username.*
2. In the Enter New Username field, enter the new username.
3. Select **Check Availability** to ensure that the username has not already been taken.
  - a. If the username is not available, a message displays. Repeat from step 2.
  - b. If the username is available, a confirmation message displays.

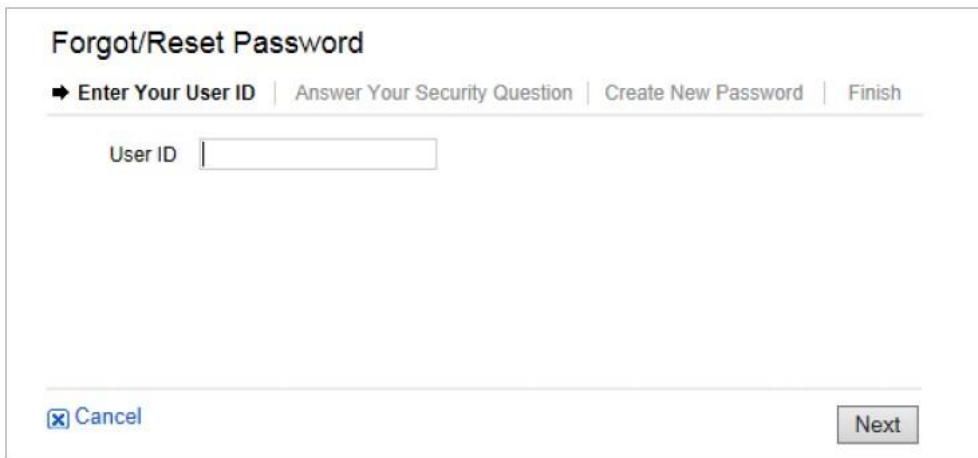
The screenshot shows two sections of a user interface. The top section is titled "Create Your New Username" and includes a sub-header "All fields are required." It features a text input field labeled "Enter New Username" containing the text "Username1". To the right of this field is a red-bordered box titled "Username Guidelines" which lists several rules: "Use 9 to 15 letters and/or numbers", "Your username must contain at least one letter", "Do not use one entire piece of personally identifiable information such as your Social Security number, telephone number, or date of birth. Instead, alter or disguise it (e.g., Jane212Smith)", "Do not use 5 or more instances of a single number or letter, or easily recognized sequences (e.g., 12345 or 11111)", and "Do not use symbols, punctuation marks, or spaces (e.g., #, @, /, \*, -)". Below the input field is a green message that says "The username selected is available" and a "Check Availability" button. The bottom section is titled "Enter Your Password" and also includes the sub-header "All fields are required." It has a "Password" label and an empty password input field. A blue "Next" button is centered at the bottom of the form.

4. Enter the login password in the Password box.
5. Select **Next**.
6. Select **Continue to Home Page** to return to the Wealthscape Investor Home Page.

### Forgot/Reset Password

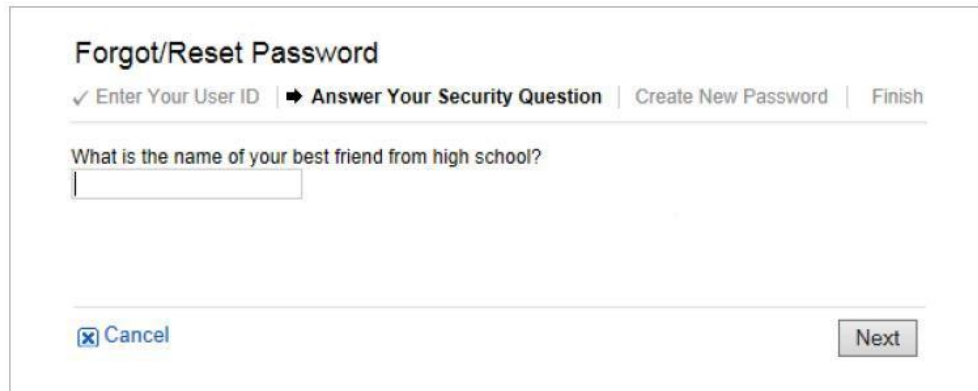
If you need to reset your password, please follow these instructions.

1. On the Wealthscape Investor Login page, select **Forgot Password**.



The screenshot shows the 'Forgot/Reset Password' page. At the top, there are four steps: 'Enter Your User ID' (selected with a right-pointing arrow), 'Answer Your Security Question', 'Create New Password', and 'Finish'. Below the steps is a text input field labeled 'User ID'. At the bottom left is a blue 'Cancel' button with a close icon, and at the bottom right is a grey 'Next' button.

2. Enter either the Wealthscape Investor user ID or username and select **Next**.



The screenshot shows the 'Forgot/Reset Password' page. At the top, there are four steps: 'Enter Your User ID' (checked with a green checkmark), 'Answer Your Security Question' (selected with a right-pointing arrow), 'Create New Password', and 'Finish'. Below the steps is a text input field with the question 'What is the name of your best friend from high school?'. At the bottom left is a blue 'Cancel' button with a close icon, and at the bottom right is a grey 'Next' button.

3. If a security question is on file, enter the answer to the security question  
Or  
If a security question is not on file, a message will inform you to enter your user ID and password on the login window. If this fails, please contact Westminster Financial.
4. In the Create New Password box, enter a new password that conforms with the Password Guidelines.
5. In the Retype New Password box, enter the new password again.
6. Select **Next**. A message confirms that you have successfully reset the password.

**Forgot/Reset Password**

✓ Enter Your User ID | ✓ Answer Your Security Question | ✓ Create New Password | ➔ **Finish**

**You have successfully reset your password**

[Continue to home page](#)

7. Select **Continue to home page** to proceed directly to the landing page.

### Remove a Saved ID

You can remove your user ID from the Wealhscape Investor Login page if you uncheck the “Remember me” indicator:

**Sign In**

Username

**Remember me**

Password

[Sign In](#)

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

Please review our [browse](#)  
Usage of this website is s  
and your other agreement  
By signing in, you consen  
described in the [Privacy F](#)

1. Select **Settings > Remove My Saved ID**. Then select **Remove my saved ID**.

**User Options > Remove saved ID**

You may choose to remove the saved ID from this computer if your ID has been saved.

[Remove my saved ID from this computer](#)