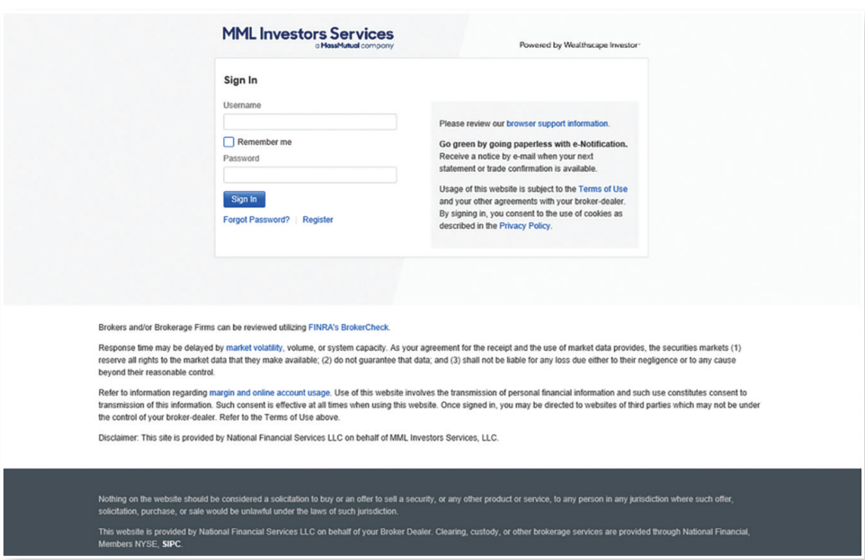
Broad Street Financial LLC

REGISTER ONLINE

To get started, you must register for online access at **wealthscapeinvestor.com/mmlis**.

The registration function allows Wealthscape Investor users to self-register without assistance from your financial firm, thus you obtain a user ID and establish a password yourself.

1. Log on to **wealthscapeinvestor.com/mmlis** and click the **Register** link.
2. Enter the last four digits of your Social Security number (SSN), your first and last name and date of birth. Select **Next**. Please note, if you do not have an SSN and only have a TIN, please contact your advisor.
3. Enter the nine-digit Wealthscape Investor account number, and select **Next**.
4. Enter a new password by following the password guidelines, and then select security question-and-answer information.
5. Select **Next**. A confirmation window states that registration was successful and provides the 10-digit user ID. You can print the confirmation page by selecting the **Print** icon.
6. Select **Continue to Home Page** to proceed directly to the landing page.



All screenshots are for illustrative purposes only.

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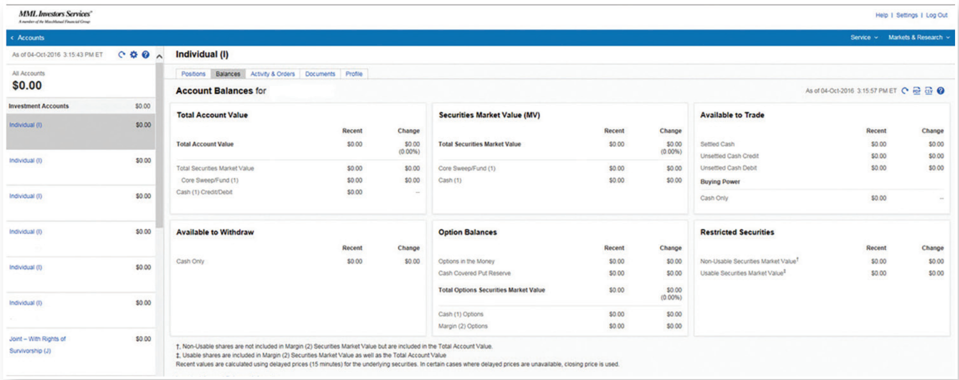
ACCESS YOUR ACCOUNT INFORMATION

Once your registration is complete, you may access your accounts, positions and balances online.

1. Log in to your account at **www.wealthscapeinvestor.com/mmlis**.
2. Select the account you wish to view from the list in the left-column.
3. Select the tabs at the top of the page to view your account holdings, activity updates and two years of transaction history.

You can customize the layout of your Account Positions screen to sort and filter the data you want to focus on.



Visit **www.wealthscapeinvestor.com/mmlis** to register for online access today!

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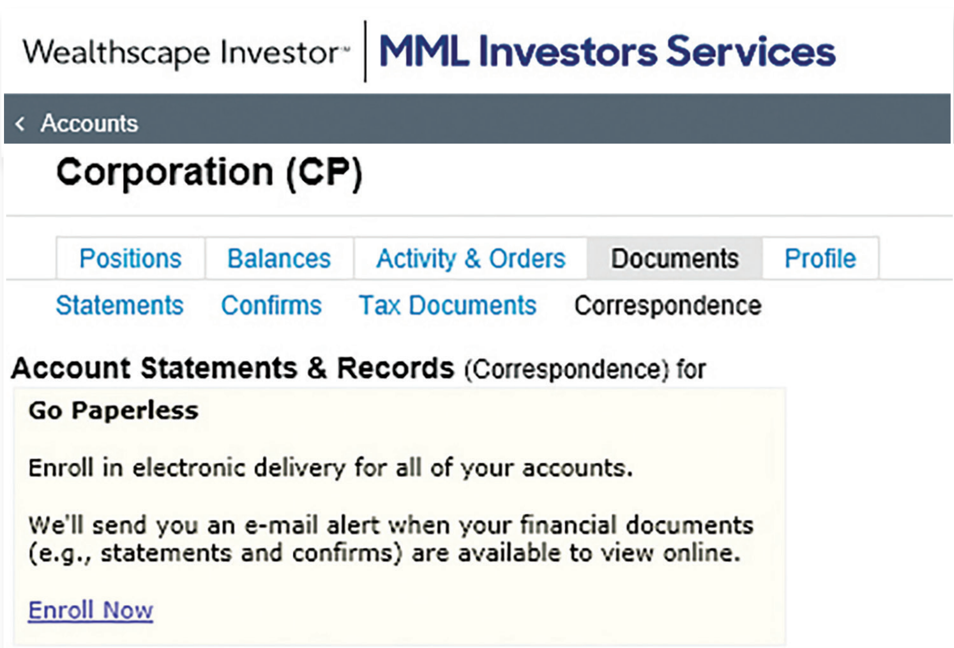
ACCESS KEY DOCUMENTS

With Wealthscape Investor, you'll always have access to your statements, confirms, tax documents and correspondence. To view documents:

1. Click **Accounts** and select the account you want to access documents for.
2. Select the **Documents** tab.
3. Select one of the links below the Documents tab for the type of document you want to view.

In addition, you can import your eligible tax forms into TurboTax and H&R Block by accessing those websites directly.



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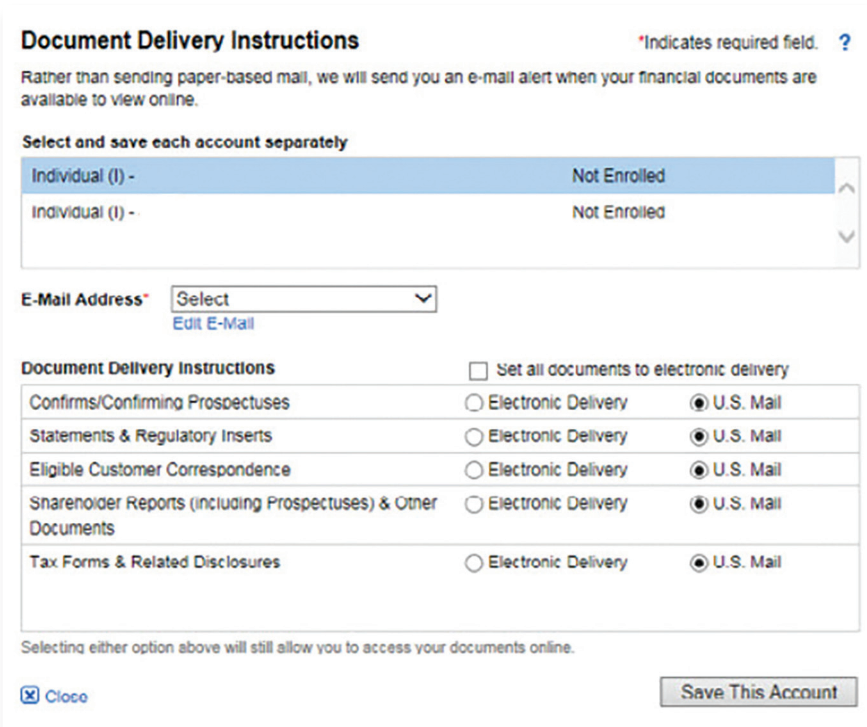
GO GREEN BY GOING PAPERLESS

Sign up for eDelivery to simplify your recordkeeping with electronic storage of statements, trade confirmations, prospectuses, shareholder reports and other eligible correspondence. You'll receive an email letting you know that a new document is available for viewing.

1. Log in to your account, select Document Delivery Instructions from the Service Menu.
2. Click an account and select the documents you'd like to receive via eDelivery.
3. Click the Save This Account button and the I Agree button to accept the terms.

With eDelivery, you can take advantage of convenient and timely email notices, instant access to your documents, enhanced security and identity theft protection and simplified recordkeeping.

Sign up for eDelivery to help simplify your recordkeeping and reduce paper clutter.a



Document Delivery Instructions *Indicates required field. ?

Rather than sending paper-based mail, we will send you an e-mail alert when your financial documents are available to view online.

Select and save each account separately

Individual (I) -	Not Enrolled
Individual (I) -	Not Enrolled

E-Mail Address* Select

Edit E-Mail

Document Delivery Instructions ☐ Set all documents to electronic delivery

Confirms/Confirming Prospectuses	○ Electronic Delivery	◉ U.S. Mail
Statements & Regulatory Inserts	○ Electronic Delivery	◉ U.S. Mail
Eligible Customer Correspondence	○ Electronic Delivery	◉ U.S. Mail
Shareholder Reports (including Prospectuses) & Other Documents	○ Electronic Delivery	◉ U.S. Mail
Tax Forms & Related Disclosures	○ Electronic Delivery	◉ U.S. Mail

Selecting either option above will still allow you to access your documents online.

☒ Close Save This Account

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This material does not constitute a recommendation to engage in or refrain from a particular course of action. The information within has not been tailored for any individual.

Use of the Wealthscape Investor Brokerage Mobile app requires an active Online Brokerage Account.

This information is as of June 30, 2017, is subject to change, and is revised periodically. Companies and trading symbols mentioned are provided for illustrative purposes only and should not be used or construed as an offer to sell, a solicitation of an offer to buy, or a recommendation for any security.

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