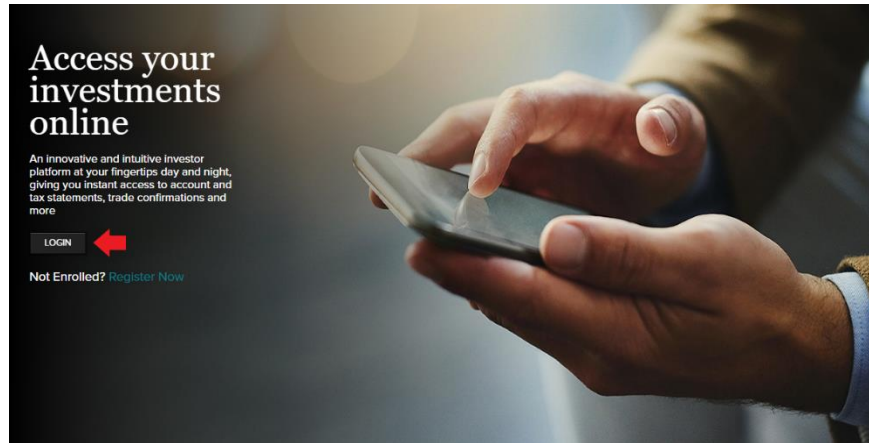


Online Access Setup Instructions

1. Go to WagnerPlanning.com
2. Click on "Client Log-In" in the upper right corner, select "Statements"
3. On the Pershing site, click "Login"



4. Enter your username and temporary password

- * Your username and temporary password will be provided by our operations team. If you do not have this information, please contact our office

5. You will be prompted to update your password

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- Next, you will be prompted to enter your preferred email address for receiving security alerts

Stronger Authentication

Security Email Setup

For your security, we require an email address where we can send you security alert notifications.

NOTE: You must set up an email address

Send security alert notifications to the following address.

Email Address

- Setup your preferred "One-Time Passcode" (OTP) by choosing your preferred contact method and entering the code provided.
 - This feature will allow you to reset your password at any time

Stronger Authentication

One-Time Passcode Setup

The one-time passcode is a temporary code we send to your selected device to confirm your identity. [Tell me more](#)

NOTE: You must set up and verify at least one contact method.

Contact Method

You can edit this in your Profile Settings.

Text STOP to 75780 or 59422 to cancel | Text HELP to 75780 or 59422 for help or call (877) 870-7230 | Message & data rates may apply: [SMS Terms & Conditions](#)

- Once you have selected an OTP delivery method, enter the code sent to you into the box provided and click "Verify"

OTP Verification

We sent you a code to verify the email address you provided. The code was sent to **operations@wagnerplanning.com**.

Enter the OTP code.

NOTE: You should receive a code within seconds. The code expires in 30 minutes.

If you replied STOP to any of your previous messages, you will not receive the code.

For Help, Call (877) 870-7230.

Didn't Receive a Code? Please make sure:

The code is being sent to the correct phone number or email.

Your mobile provider or SPAM filters do not block third party messaging.

If you are unsure, contact your provider.

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9. Choose your preferred Theme

Introducing the Accessible Theme

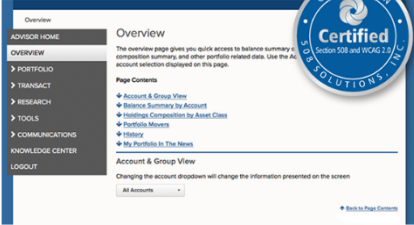
As part of our ongoing effort to ensure we provide the best online experience for all

Recommended For:

- Users with Operating System Accessibility Features Turned On
- Users Employing Assisted Technology Applications

Features:

- Accessible Experience
 - Updated Navigation Menu
 - New Page Titles and Page Description
 - Links for quick navigation of Page Contents
 - Full keyboard navigation
 - Improved color contrast
 - Single column layout
- WCAG 2.0 Compliant
- Enhanced Assisted Technologies Support




Switching to the Accessible Theme now will also save this theme for future use. You can change your theme anytime by navigating to settings.










[SWITCH TO ACCESSIBLE THEME](#) [CONTINUE WITH CURRENT THEME](#)

Note: You may change any of the above at a later time in "Profile Settings", under the gear icon

 BNY MELLON | PERSHING

Enter Symbol or Name [LOGOUT](#) 

Last Login: Jun 13, 2022 4:05 PM (ET)

 **PORTFOLIO**  **TRANSACT** **RESEARCH**  **TOOLS**  **COMMUNICATIONS**  **Go paperless**    

Overview Balances Holdings Valuation Over Time Unrealized Gain/Loss Realized Gain/Loss History Projected Cash Flow [Profile settings](#)

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