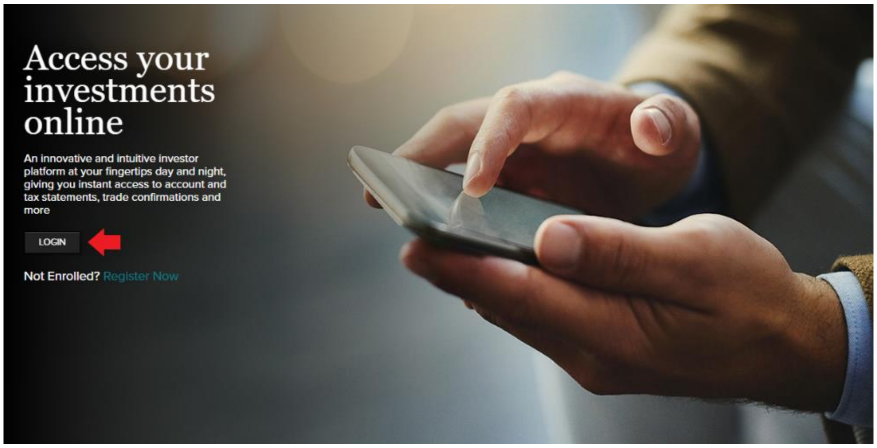
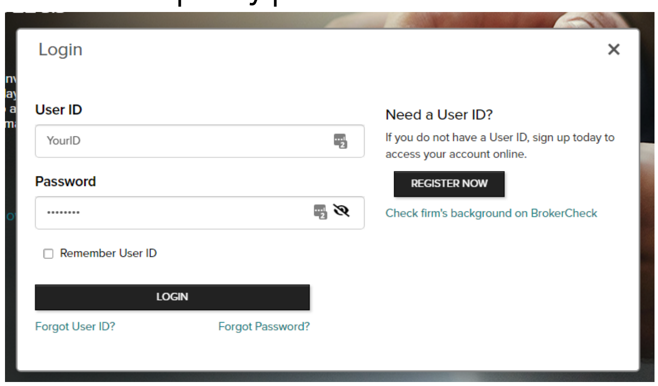
Online Access Setup Instructions

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"

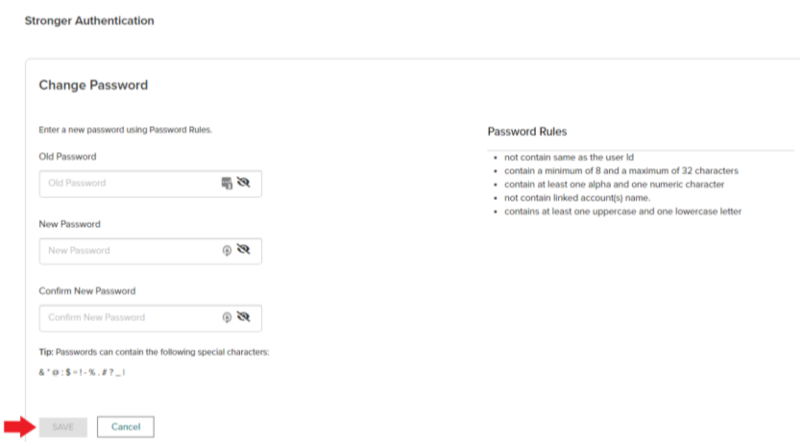


4. Enter your username and temporary password

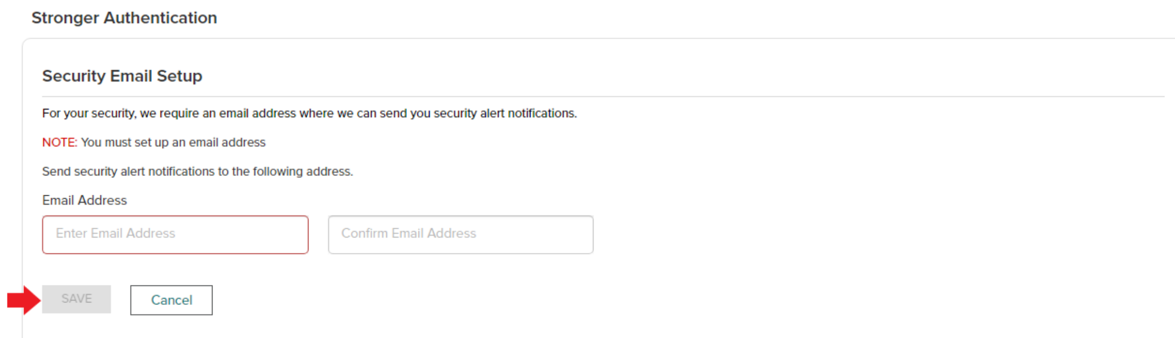


* Your username and temporary password will be provided by our operations team. If you do not have this information, please contact our office

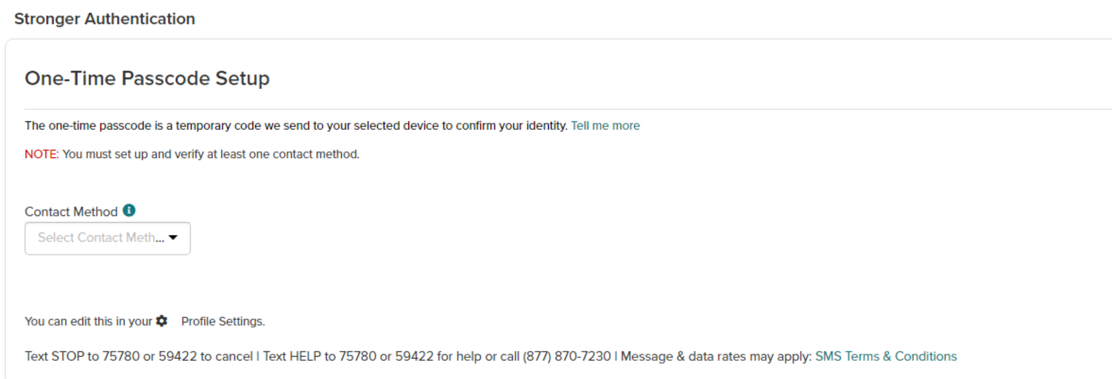
5. You will be prompted to update your password



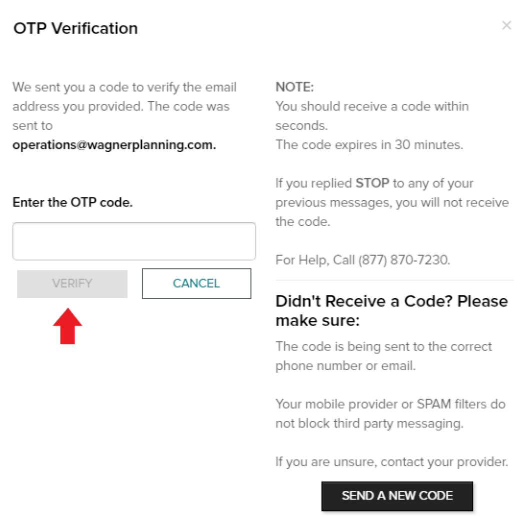
6. Next, you will be prompted to enter your preferred email address for receiving security alerts



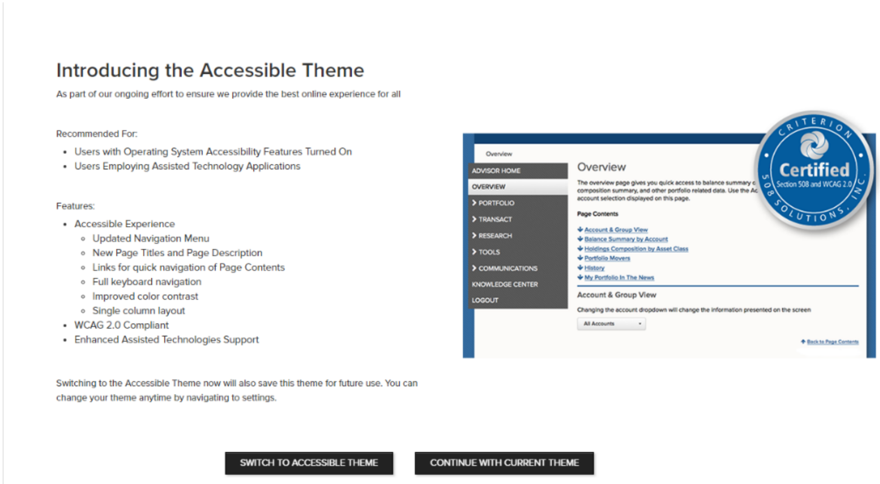
7. Setup your preferred "One-Time Passcode" (OTP) by choosing your preferred contact method and entering the code provided.
    a. This feature will allow you to reset your password at any time



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



9. Choose your preferred Theme



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