

# Secure Site Tutorial

Working together with your advisor, digitally, through the secure site, will allow you to have full transparency into your accounts from any device you choose at any time. The secure site enables you to work securely with your advisor, share documents, and see progress towards your financial goals.

This document contains information about:

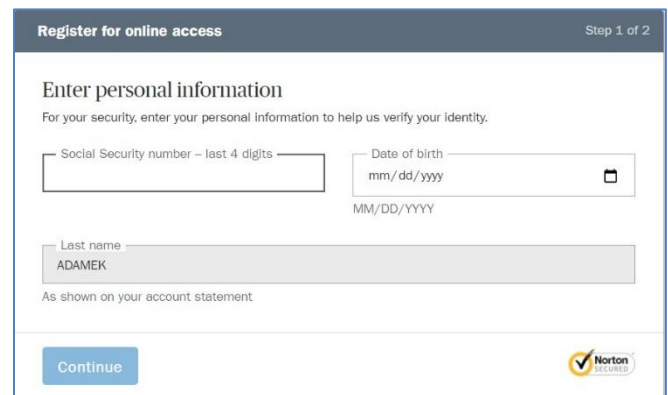
- Setting up your account
- Secure Site overview
- Secure Site benefits

## Setting up your account:

If you've received an invitation link to register for the secure site via email or text

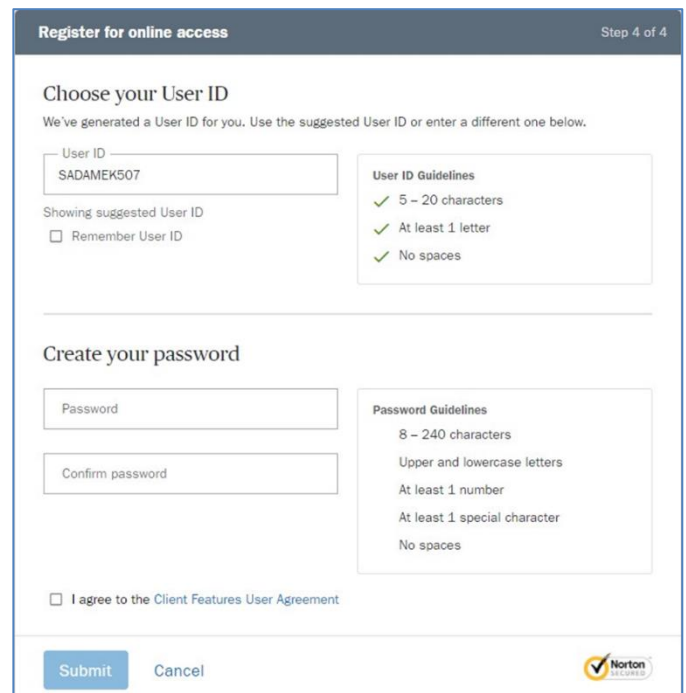
1. On **Register for online access step 1 of 2** page:

- Type last 4 digits of social security number
- Type date of birth (MM/DD/YYYY)
- Click **Continue**



2. On **Register for online access step 2 of 2** page:

- Type a User ID (requirements on right side)
- Clients can use the suggested User ID if desired
- Type a password twice (requirements on right side)
- Click the 'I agree to the **Client Features User Agreement**' checkbox
- Click **Submit**



3. On **Choose your document delivery preferences** page:

- Click **Customize deliver settings** to expand and see options for each document type
- Click the checkbox for each document type you wish to have Online delivery
- Click **Submit**

Choose your document delivery preferences

Thanks for registering. Before we take you to your accounts, let's set up your document delivery preferences.

### Online document delivery is fast and secure

To reduce the amount of paper you receive, we'll email you when documents are ready to view online instead of mailing them. Occasionally, shareholder documents may be sent by mail, even if you sign up for online delivery. You can update your preferences at any time in Communication Preferences in your Profile.

- Secure
- Available 24/7
- Less clutter

I choose online delivery for tax documents

I choose online delivery for all my other eligible documents

[Customize delivery settings](#) ▾

By selecting the options above, you acknowledge you have read and agreed to the [Online Delivery Consent Agreement](#).

**Submit**

A for 2020: Eligible taxpayers have until April 15, 2021 to fund a traditional IRA or Roth IRA for 2020. The 2020 contribution limit is \$6,000, or \$7,000 if you

The expanded **Choose your document delivery preferences** page will look like this:

Choose your document delivery preferences

I choose online delivery for tax documents

I choose online delivery for all my other eligible documents

[Customize delivery settings](#) ▲

**Select the document types you'd like to receive by online delivery**

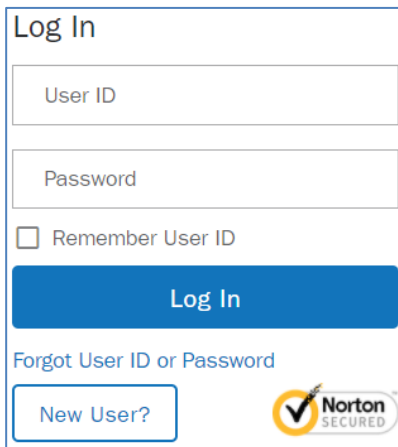
- Account statements**  
Notices of updates or changes to your accounts, disclosures and various inserts, including our privacy notice
- Tax documents**  
Tax documents required by the IRS and supplemental tax information included with tax reporting
- Financial confirmations**  
Notifications of activity on your accounts, including money transfers and trade confirmations
- Shareholder documents**  
Includes prospectuses, supplements, annual reports, semi-annual reports and proxies
- Administrative documents**  
Change of beneficiary confirmations, RMD notices, name changes and other documents

By selecting the options above, you acknowledge you have read and agreed to the [Online Delivery Consent Agreement](#).

**Submit**

## Setting up your account: If you're registering for the secure site directly through Ameriprise.com

1. Click New User in Ameriprise.com log in widget:

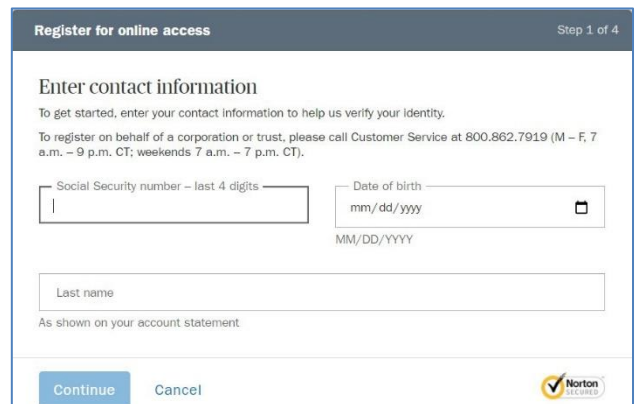


The screenshot shows a 'Log In' widget with the following elements:

- A 'Log In' title at the top.
- A text input field labeled 'User ID'.
- A text input field labeled 'Password'.
- A checkbox labeled 'Remember User ID'.
- A blue button labeled 'Log In'.
- A link labeled 'Forgot User ID or Password'.
- A button labeled 'New User?'.
- A 'Norton SECURED' logo at the bottom right.

2. On **Register for online access step 1 of 4** page:

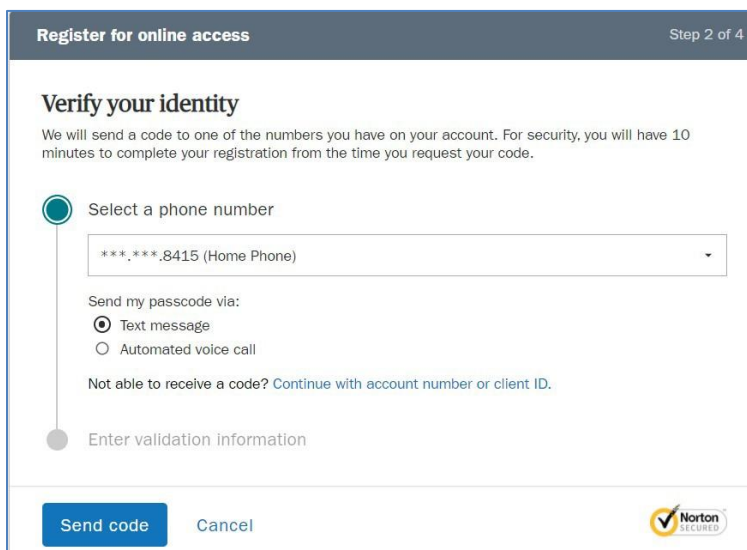
- Type last 4 digits of social security number
- Type date of birth (MM/DD/YYYY)
- Type last name
- Click **Continue**



The screenshot shows the 'Register for online access' page, Step 1 of 4. The page title is 'Register for online access' and the step indicator is 'Step 1 of 4'. The main heading is 'Enter contact information'. Below the heading, there is a sub-heading 'Enter contact information' and a paragraph: 'To get started, enter your contact information to help us verify your identity. To register on behalf of a corporation or trust, please call Customer Service at 800.862.7919 (M - F, 7 a.m. - 9 p.m. CT; weekends 7 a.m. - 7 p.m. CT)'. There are three input fields: 'Social Security number - last 4 digits', 'Date of birth' (with a calendar icon and the format 'mm/dd/yyyy'), and 'Last name' (with the format 'MM/DD/YYYY' below it). Below the 'Last name' field, there is a note: 'As shown on your account statement'. At the bottom, there are two buttons: 'Continue' and 'Cancel', and a 'Norton SECURED' logo.

3. On **Register for online access step 2 of 4** page:

- Select a phone number from the phone number dropdown
- Select **Text message** or **Automated voice call** radio button
- click **Send code**
- If you click the **Continue with account number or client ID** link, go to step 5 below



The screenshot shows the 'Register for online access' page, Step 2 of 4. The page title is 'Register for online access' and the step indicator is 'Step 2 of 4'. The main heading is 'Verify your identity'. Below the heading, there is a paragraph: 'We will send a code to one of the numbers you have on your account. For security, you will have 10 minutes to complete your registration from the time you request your code.' There are two steps in a progress bar: 'Select a phone number' (which is active) and 'Enter validation information'. Under 'Select a phone number', there is a dropdown menu showing '\*\*\*.\*\*\*.8415 (Home Phone)'. Below the dropdown, there is a section 'Send my passcode via:' with two radio buttons: 'Text message' (which is selected) and 'Automated voice call'. Below this, there is a link: 'Not able to receive a code? Continue with account number or client ID.' At the bottom, there are two buttons: 'Send code' and 'Cancel', and a 'Norton SECURED' logo.

4. On **Register for online access step 2 of 4** page:

- Enter the OTP code received via text message or voice call
- Click **Continue**
- Proceed to Step 6

**Register for online access** Step 2 of 4

### Verify your identity

We will send a code to one of the numbers you have on your account. For security, you will have 10 minutes to complete your registration from the time you request your code.

✓ Select a phone number  
Passcode sent to \*\*\*.\*\*\*.8415. [Choose a different number.](#)

○ Enter validation information

Enter 6-digit code

Passcodes can take 10 - 30 seconds to arrive. [Send a new code.](#)

[Continue](#) [Cancel](#)

5. (If you click the Continue with account number or client ID) On **Register for online access step 2 of 4** page:

- Enter one of your account numbers or your client ID
- Click **Continue**
- Proceed to Step 6

**Register for online access** Step 2 of 4

### Verify your identity

We will send a code to one of the numbers you have on your account. For security, you will have 10 minutes to complete your registration from the time you request your code.

✓ Select a phone number  
You've chosen to enter your account number or client ID to verify your identity. [Choose a different method.](#)

○ Enter validation information

Enter your account number or client ID below.

or

Where can I find my account number or client ID?

[Continue](#) [Cancel](#)

6. On **Register for online access step 3 of 4** page:

- Validate your email address and telephone numbers (change if incorrect)
- Click **Continue**

Register for online access Step 3 of 4

### Email address

[How will this be used?](#)

Personal email address

bleuat4@gmail.com

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### Phone numbers

When you provide your mobile phone number, we'll text or call you only to verify your identity or notify you of suspicious activity. We won't use it for marketing. Message and data rates may apply. [How will this be used?](#)

Mobile phone number

Home phone number  
540.298.8415

Office phone number

Other phone number 1

Other phone number 2

**Continue** Cancel

7. On **Register for online access step 4 of 4** page:

- Type a User ID (requirements on right side)
- Clients can use the suggested User ID if desired
- Type a password twice (requirements on right side)
- Click the 'I agree to the **Client Features User Agreement**' checkbox
- Click **Submit**

Register for online access Step 4 of 4

### Choose your User ID

We've generated a User ID for you. Use the suggested User ID or enter a different one below.

User ID  
SADAMEK507

Showing suggested User ID

Remember User ID

**User ID Guidelines**

- ✓ 5 - 20 characters
- ✓ At least 1 letter
- ✓ No spaces

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### Create your password

Password

Confirm password

**Password Guidelines**

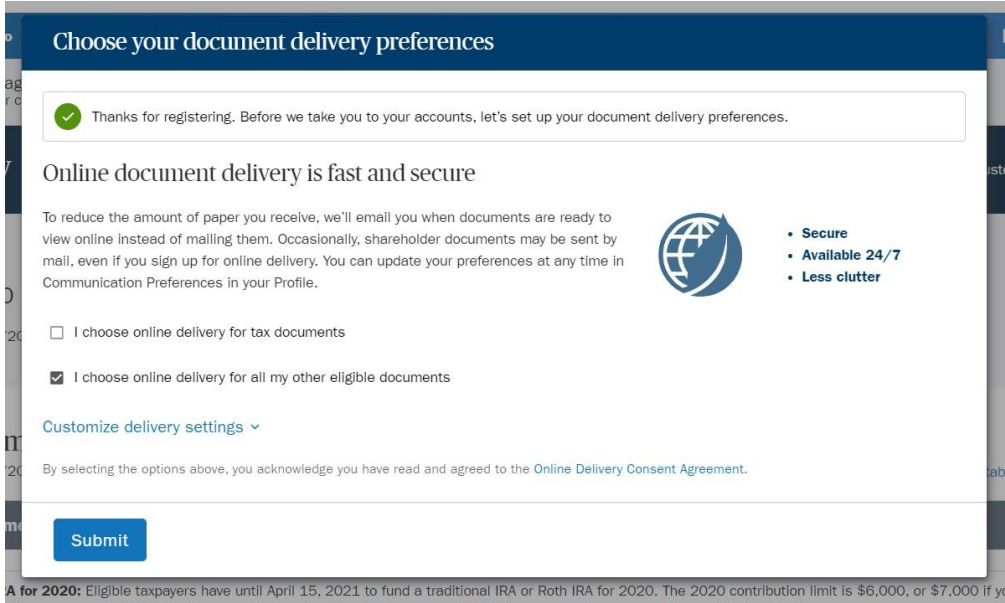
- 8 - 240 characters
- Upper and lowercase letters
- At least 1 number
- At least 1 special character
- No spaces

I agree to the Client Features User Agreement

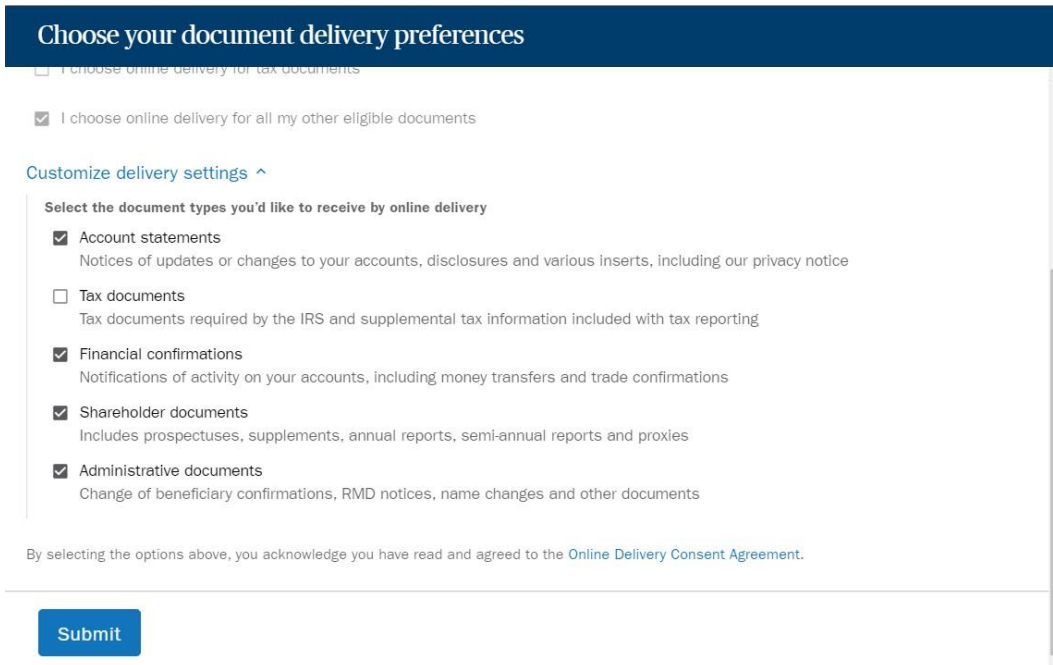
**Submit** Cancel

**8. On Choose your document delivery preferences page:**

- Click **Customize deliver settings** to expand and see options for each document type
- Click the checkbox for each document type you wish to have Online delivery
- Click **Submit**



The expanded Choose your document delivery preferences page will look like this:



## Secure Site Overview

The information below reflects using the secure site on ameriprise.com on a computer-based browser. Smaller screens like tablets and phone web-based navigation is similar, but the information and menus automatically contract and format to fit the window size.

The first time you log into the secure site, a pop up tutorial on the *Overview* page will guide you through the site. You must click through the tutorial before using the secure site on ameriprise.com.

Below *Overview* is a *Customize page layout* link that displays a pop-up window where you can rearrange the order of information displayed on your *Overview* page or have certain sections hidden. Sections that can be moved or hidden include:

- Total View
- Account summary (can only be moved, not hidden)
- Portfolio progress
- Recent activity
- News & Financial Insights
- Advisor information (can be locked to the bottom of page instead of floating, not hidden)

## Total asset value

- Combines the values of accounts held at Ameriprise
- Change in value of all your Ameriprise Brokerage Platform account
- Values in both dollars and percent with an up (green) or down (red) indicator
- Provides timestamp for when the data was updated

## Total View

Total View is an account aggregation tool that allows you to have a more complete view of your financial picture. Total View enrollment also allows your progress towards your goals to update in real time. We encourage all clients to sign up for, and add accounts into Total View. Please speak to your advisor if you have questions about Total View and its benefits.

The screenshot displays the Ameriprise Overview page. At the top, there is a navigation bar with links for Overview, Portfolio, Documents, Goals, Trade & Research, Transfers & Tools, and My Advisors. The main content area is titled "Overview" and includes a "Customize page layout" link. The "Account summary" section shows "No account information available." The "Total View" section displays a summary of Net value (-\$569.17), Assets (\$898.00), and Liabilities (\$1,467.17). The "Portfolio progress" section shows a line chart for May 2018 with a table of values: Starting balance (\$0.00), Net contributions (\$0.00), Change in value (\$0.00), Net change (\$0.00 / 0.00%), and Ending balance (\$0.00). The "News & Financial Insights" section features "Market Data" for DJIA, NASDAQ, S&P 500, and AMP, along with "Weekly Markets Commentary" by David Joy and "Perspectives from Columbia Threadneedle" by Colin Moore. The "Recent activity" section states "You have no posted activity for the last 30 days." At the bottom, there is a "See where you stand" section with a pyramid diagram and a "Start now" button.



If you enroll in Total View:

- The Total View bar displays below the Total Asset Value bar
- The Net Value, Assets and Liabilities generate values from accounts you add
- The *View details* link will take you to the full *Total View* page If you do not enroll in Total View
- The Total View bar displays below the Recent activity section
- An *Enroll now* link replaces the *View details* link

## Account Summary

The account summary holds the account information and group selector (if multiple groups). The top displays a timestamp showing the last retrieved date and time for the financial data.

This section contains a quick view of the Portfolio Progress of your combined accounts. The graph defaults to a *Months* view, but can be changed to a *Quarters* or *Years* view.

*View details* can be clicked to show additional information and will take you to the *Portfolio Progress* page under the *Portfolio* menu.

## Portfolio Progress

The Portfolio sub-pages list your combined accounts in the currently selected group. The sub-pages do not include pension groups.

## Recent Activity

The Recent Activity section displays recent transactions within your accounts.

## News & Financial Insights

Links to featured market perspective articles from Ameriprise and a snapshot of current market values.

## Goals

This section contains our proprietary *3-Minute Confident Retirement*® check. This is a simple questionnaire that will give you an idea of how prepared you are for retirement. You can share your results with your advisor, get a list of recommended questions to ask and see how your confidence level compares to the U.S. average and other Ameriprise clients.

The information displays differently here based on if you have navigated through the retirement check or not.





- If you have not taken the check, click *Start now* to navigate through the check
- If you have taken the retirement check, a snapshot of the results displays and you can click *Review your results* to view the result details

The results of the check verify what you selected and provides additional information for each category.



Ike and Izzy's goals Timeline | Hide detail

Needs

Retirement - Living Expense

Jane (2020)	63
Harry (2021)	65
Jane retired and Harry Employed (2020-2020)	\$60,000
Both retired (2021-2046)	\$120,000
Jane alone retired (2047-2047)	\$96,000

Wants

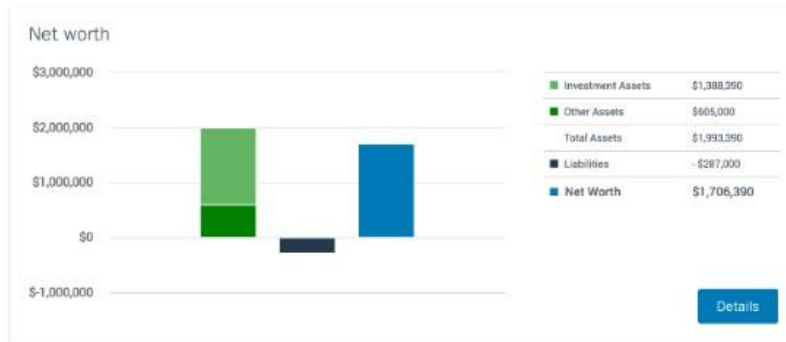
Truck

When both are retired  
Recurring every 7 years  
until end of Scenario

\$30,000

Wishes

Powerboat Retirement Gift



## Secure Site Benefits

To get the most out of your digital secure site experience, make sure you understand and use each of the following features:

### E-delivery

You can receive important financial documents online rather than in the mail to ensure flexibility, convenience and security.

- Reduce the amount of paper received by choosing which Ameriprise Financial documents you want to receive electronically
- Easily access account documents at your convenience on the secure site in Statements & Documents
- Reduce the risk of stolen mail and loss of paper documents from natural disaster with state-of-the-art security and privacy technology

### Alerts

Alerts, both email and text, keep you informed of account changes and activity. They are a great way to help you feel more confident and gain more control over how you safeguard your information.

- Profile and security alerts: When your address, phone, email address or password are changed; or when your account has been locked or accessed from a new device or browser
- Account alerts: When external bank accounts are added for money transfers, or money transfers are requested or updated
- Advisor alerts: When new documents, secure messages or meetings are shared with you

### eSignature

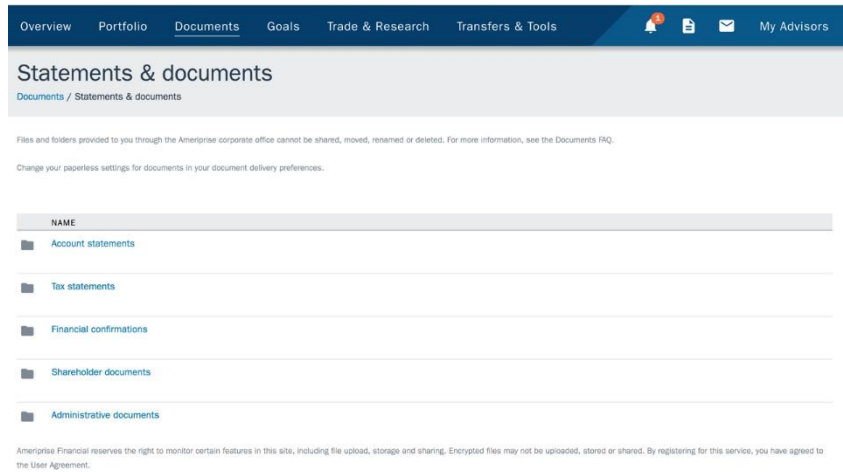
eSignature allows you to sign documents electronically.

- Saves time and reduces the amount of paper received
- Shortens the processing time of documents
- Easily and securely access and e-sign documents on the secure site

### Statements & Documents

Upload, share and store documents safely and securely. Your advisor can also upload documents for you to view and collaborate on.

- You can securely and easily share documents with significant others in your household if you are both registered for the site
- Provides you a secure location with unlimited free storage to upload and store important documents — wills, passport copies, birth certificates — for your own use



## Meetings and Notes

You can view future and past meetings and meeting details when those meetings have been shared by your advisor.

- You can view meetings on the secure site including detailed meeting information and connection details for virtual meetings
- You can add meetings to your personal calendar
- Receive new meeting and reminder emails and alerts

## Bill Pay and Money Movement

Make one-time or recurring transfers to and from external accounts, as well as conduct transfers between Ameriprise accounts. Conduct trades and review balances. And gives you an online solution for paying bills.

- Automatically add money to your accounts
- Online bill pay is an online solution you can use to pay bills out of your *Ameriprise ONE®* Financial Account or *Ameriprise®* SPS *Advantage* account

## Message Center

Communicate with your advisor securely through the message center inside the secure site. Set up your notifications to receive an email or text message each time you receive a message inside of the message center.

- Functions like an email inbox allowing you to set up folders and organize your messages.
- Add contacts and attachments to securely share documents.

Take advantage of most of these features and more with the Ameriprise Financial App.

**Disclosures:**

The secure site is intended for informational purposes only and is not an official report of any of your accounts. Accuracy, completeness and timeliness cannot be guaranteed.

The displayed value of your accounts on the secure site and current market value of your securities may be updated using at least 15-minute delayed quotes for exchange-traded securities during market hours. Market data should be used for informational purposes only and is subject to change.

Account data on screenshots in this document is for illustrative purposes only, does not reflect actual account data and is not a recommendation.

The third party account information shared with your financial advisor through Total View is for informational purposes only. Review or analysis of this information does not constitute an endorsement or recommendation by your financial advisor or Ameriprise of the investments, products or services held or utilized by you and referenced by such third-party account information and does not create a duty to advise you with respect to such third-party assets and services.

**Investment products are not federally or FDIC insured, are not guaranteed by any financial institutions, and involve investment risks including possible loss of principal and fluctuation in value.**

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