



TSW WEALTH
MANAGEMENT

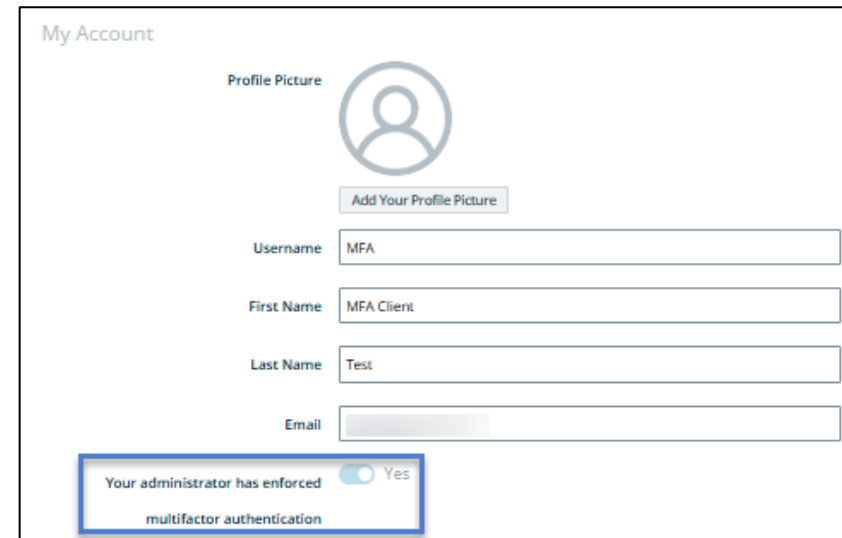
Multi-Factor Authentication

Multi-Factor Authentication (MFA)

Multi-Factor Authentication (MFA) is an added security step required when logging into your account. After entering your username and password, you'll verify your identity using a second method.

What To Expect:

- You will use this verification method each time you log in as an added security measure for your account.
- My Preferences allows you to view and configure your MFA methods.

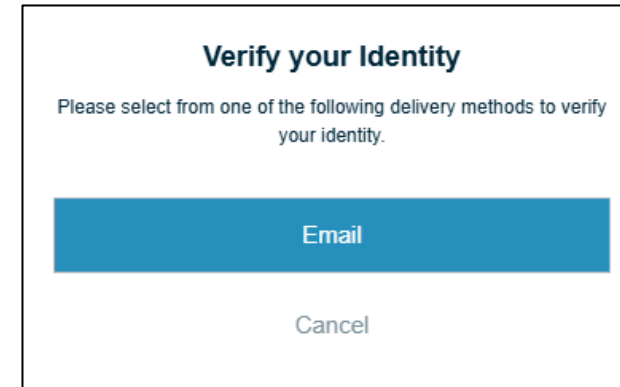


The screenshot displays the 'My Account' settings page. At the top, there is a 'Profile Picture' section with a placeholder icon and a button labeled 'Add Your Profile Picture'. Below this are four text input fields: 'Username' (containing 'MFA'), 'First Name' (containing 'MFA Client'), 'Last Name' (containing 'Test'), and 'Email' (empty). At the bottom, a toggle switch is shown with the text 'Your administrator has enforced multifactor authentication' and the toggle is currently set to 'Yes'.

Verify MFA Using Email

Follow these steps to verify MFA using email on your next login:

- Sign in with your username and password as usual.
- Select Email as your verification method. An email will be sent to the address on file.
- Open the email and obtain the 6-digit authorization code.
 - Each code is valid for 10 minutes.
- Enter the 6-digit code sent to your email to verify your account.
- MFA verification is complete and you will be redirected to your account.
 - You will be prompted to verify MFA using email at each login.

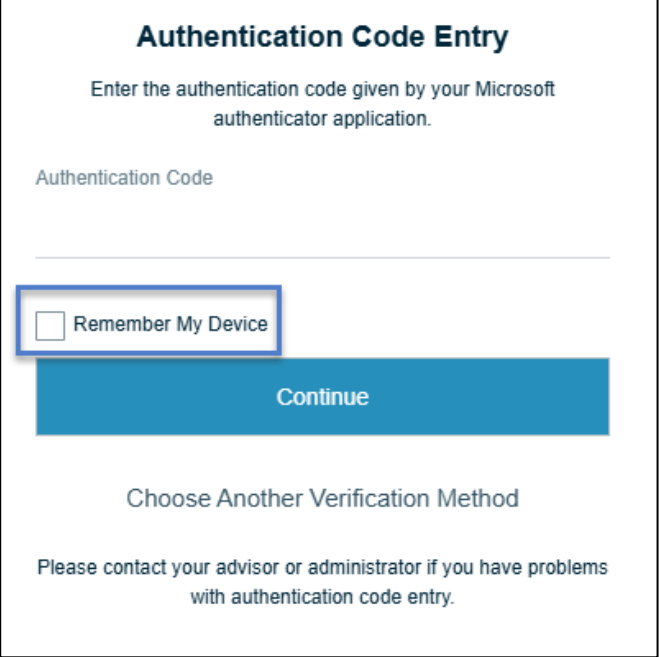
A rectangular dialog box with a thin black border. At the top, the text "Verify your Identity" is centered in a bold, dark blue font. Below this, a smaller line of text reads "Please select from one of the following delivery methods to verify your identity." In the center of the dialog is a large, solid blue rectangular button with the word "Email" written in white text. Below the blue button, the word "Cancel" is centered in a smaller, grey font.

Remember My Device

To avoid verifying your identity every time you log in from the same computer or device, you can choose to remember your device.

- After entering your MFA verification code, check the box labeled *Remember My Device* before clicking *Continue*.
- On future logins from this same device or browser, you will not be prompted for a verification code.
- If you log in from a different device, browser or in private/incognito mode, you will be required to verify again.

Note: Only check Remember My Device on devices you trust and use regularly, such as your personal computer or phone.



Authentication Code Entry

Enter the authentication code given by your Microsoft authenticator application.

Authentication Code

☐ Remember My Device

Continue

[Choose Another Verification Method](#)

Please contact your advisor or administrator if you have problems with authentication code entry.

Once Logged In, Select “My Preferences” & Manage MFA Settings

The screenshot displays the TSW Wealth Management client dashboard. The top navigation bar includes links for HOME, NET WORTH, PORTFOLIO, and VAULT, along with a 'Client' dropdown menu. The dashboard is divided into several sections: a left sidebar with the TSW logo and website URL, a 'Financial Team' section listing Terry Wells and Sarah Wells, and a 'Contact Information' section. The main content area features a 'Client' profile with a greeting and total value, an 'Accounts' table, and a 'Top Holdings' list. A callout box with an arrow points to the 'Client' dropdown menu.

Client Profile:

- GOOD AFTERNOON, Client
- TOTAL VALUE: \$2,265,811

Accounts Table:

NAME ^	MARKET VALUE ^
Bill and Savannah Bucks Advisory Joint Tena...	\$65,039 08/04/2026
Bill Bucks Advisory IRA	\$1,064,192 08/04/2026
MMKT Savings Bank of America	\$235 08/04/2026
Savannah Bucks Advisory ROTH	\$14,340 08/04/2026
Savannah Bucks Advisory 403b	\$471,560 08/04/2026
Savannah Bucks Advisory IRA	\$650,446 08/04/2026

Top Holdings:

STATE STREET SPDR PORTFOLIO S&... SPYM	15%
ISHARES RUSSELL 1000 LARGE-CAP I... BRGKX	8%
ISHARES 10-20 YEAR TREASURY BON... TLH	7%
STATE STREET SPDR PORTFOLIO S&... SPYG	6%
STATE STREET SPDR PORTFOLIO S&... SPYV	5%
ISHARES U.S. EQUITY FACTOR ROTA... DYNF	5%

Callout Box:

Once successfully logged in, go to Your Name in the upper right-hand corner & select “My Preferences”

Manage Your MFA Settings: Email Code

You can view and manage your MFA settings anytime from User Preferences.

- To update the address on file for email code verification, change the current Email address to the new address and click **Save**. You will be required to verify your password to successfully save the new email address.

Note: If you've lost access to your email address on file, contact your advisor for assistance to have it update to a new email address.

The screenshot displays the 'My Account' settings page. At the top, there is a 'Profile Picture' section with a placeholder icon and a button labeled 'Add Your Profile Picture'. Below this are input fields for 'Username' (containing 'MFA-Client'), 'First Name' (containing 'MFA-Client'), and 'Last Name' (containing 'Test'). The 'Email' field is highlighted with a red rectangular box. Underneath the email field, a toggle switch indicates 'Your administrator has enforced multifactor authentication' is set to 'Yes'. The 'Phone Numbers' section includes fields for 'Mobile' (with '49' entered and 'Verified' status), 'Work', and 'Home', each with an 'Ext.' field and a 'Clear' button. The 'Change Password' section has 'New Password' and 'Confirm New Password' fields, with a note stating: 'The password needs to be at least 12 characters long', 'The password needs at least 1 number', and 'The password needs at least 1 special character'. The 'Change Security Questions' section contains three questions, each with a dropdown menu (all set to 'Select') and a text input field with a scribble icon. The 'Authenticator App' section shows 'App Name' as 'Google' and 'Status' as 'Enabled', with a 'Clear' button.

Manage Your MFA Settings: SMS/Text Code

You can view and manage your MFA settings anytime from User Preferences.

- To update your mobile number for text message verification, go to Phone Numbers and clear or update your number.
- Remember to click **Save** to ensure any changes are captured.

Note: If you've changed your phone number, contact your advisor for assistance to have it reset.

My Account

Profile Picture 
[Add Your Profile Picture](#)

Username

First Name

Last Name

Email

Your administrator has enforced ☒ Yes
multifactor authentication

Phone Numbers

Mobile Verified [Clear](#)

Work Ext. [Clear](#)

Home Ext. [Clear](#)

Change Password

New Password

Empty

Confirm New Password

Password Requirements
The password needs to be at least 12 characters long
The password needs at least 1 number
The password needs at least 1 special character

Change Security Questions

Security Question 1 



Security Question 2 



Security Question 3 



Authenticator App

App Name Google

Status Enabled [Clear](#)

Sign-In Help & Troubleshooting

Follow these steps to quickly regain access to your account.

