Lincoln Financial Advisors®
A member of Lincoln Financial Group

You're In Charge®

Account access when you need it

Wealthscape Investor℠

Internet account access

Your account with Lincoln Financial Advisors offers secure, password-protected access to your financial information via the Internet and mobile devices. This flexible and convenient service, along with the advice of your Lincoln Financial Advisors representative, can help you make more informed investment decisions.

Wealthscape Investor

Use our secure Internet site, Wealthscape Investor, to view your account data and the latest quotes and market statistics.

Find the information you need — when you need it — by logging onto Wealthscape Investor and save the more complex aspects of your portfolio for discussion with your Lincoln Financial Advisors representative.

Retrieve account information quickly and at your convenience

- Look up your account balances, including prior day and intraday balances.
- Take advantage of the easy-to-use Portfolio Summary.
- Check the market value of positions held in your account, updated throughout the day.
- Review cost basis and gain/loss information.
- Watch order status for up-to-the-minute updates of filled, open or canceled trade orders.
- Review your most recent transaction history.
- View account statements, tax documents and trade confirmations.
- Check your positions in selected annuities.
- Stay connected with the Wealthscape Investor mobile app. Tap into your online brokerage account when you're on-the-go. You can view your positions, balances and transaction history from your Android™, iPhone® or iPad®.
- The Online Help feature makes Wealthscape Investor easy to understand and use.

Take advantage of Mobile Check Deposit

The Mobile Check Deposit feature on the Wealthscape Investor Mobile App offers you a quick, secure, efficient way to deposit checks into your brokerage account for timely processing straight from your iPhone®, iPad® or Android™ device. Simply snap a picture of the check, key in the amount and select the account to receive the deposit.

[1]Research information is provided by third party sources and obtained from sources deemed reliable, but is not guaranteed.

Access valuable market and research data[1]

- Obtain quotes from all U.S. exchanges along with U.S. and world market statistics.
- Create watch lists to monitor specific securities.
- Read the latest news on companies whose securities interest you.
- Create charts on companies using a variety of factors.
- View company profiles and rankings by your choice of criteria, earnings and more.

Optional online services include

- **Account downloads**
  - Download your account data to Quicken® for easy analysis.
  - Import eligible tax forms from Wealthscape Investor into TurboTax®.

Use Bill Pay and Bill Management

- **Bill Pay[2] –** Online payments to any business, merchant or individual. You choose when and how much to pay and set automatic payments from your account. Up to 12 transactions per month at no charge with a fee for each subsequent transaction.
- **Bill Management[2] –** Select notification of bills due, either by U.S. mail or online. The service includes online payment to anyone, up to 15 transactions per month, at no charge. There is a fee for each subsequent transaction (presentment or payment). Ask your Lincoln Financial Advisors representative for additional information on Bill Pay and Bill Management fees.
- **eDelivery –** Suppress paper mailings of statements, statement inserts, confirmations, confirming prospectuses, shareholder reports and proxies. Enroll and receive an email notifying you when these items are available for viewing online. Tax documents are eligible for eDelivery.

Getting started

Simply follow these steps to obtain a Wealthscape Investor User ID and password:

- Go to LFA-Sagemark.com. Then click on the *My Accounts* tab followed by *Access*. Scroll down to the *Wealthscape Investor Access* section and click the link to self-register.
- For your added security:
  - Wealthscape Investor passwords must be reset every 90 days. You will receive a login warning message five days before the password's expiration date if you log in during this time frame. You must log on at least once every 365 days to keep your account active.
    - You can reset your password online at any time.

[2]Bill Pay and Bill Management features are not appropriate to Retirement or Lincoln Premier Series clients.

System requirements

Supported browsers and operating systems

- Microsoft® Internet Explorer
  - IE11 Windows® 10 and Windows 7
  - Microsoft Edge® 14 on Windows 10
  - Note: Compatibility Mode OFF for all IE
- Mozilla Firefox®
  - Firefox® 51 on MAC®
- Google Chrome™
  - Chrome 55 on Windows® 10 and 7
- Apple® Safari®
  - Safari 10 on MAC®
- iPhone® 5+ and iPad® 4+
  - iOS 9.0+
- Android™
  - Android OS 4.3+

Mobile access

Use your Android™, iPhone® or iPad® to access your online brokerage account when you're on the go. You can view positions, balances and transaction history anywhere, anytime.

Learn more about Wealthscape Investor

Contact your Lincoln Financial Advisors representative for additional information on convenient Internet and mobile access to your securities brokerage account or for assistance

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