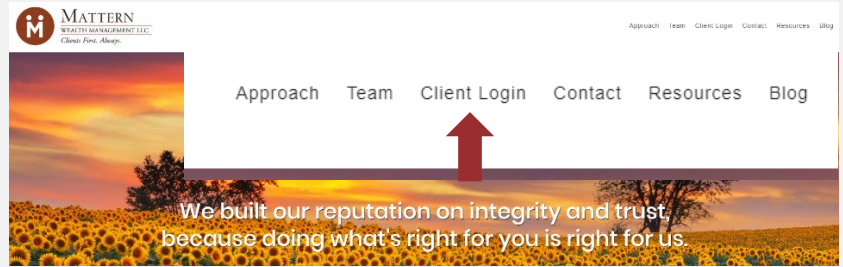


# Self-enrollment for Mattern Wealth Management Access Online

Go to [MatternWealth.com](http://MatternWealth.com) and click on “Client Login” in the top right navigation bar of the screen.

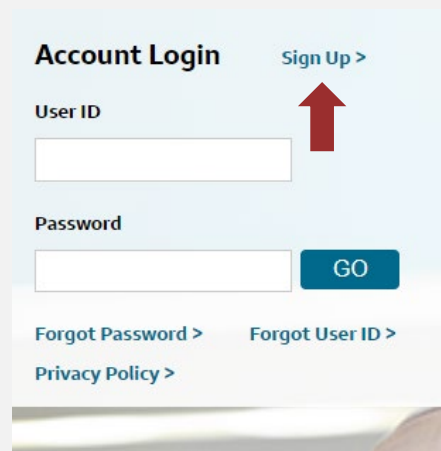


Underneath the Mattern Wealth Logo select “Client Account Login”.



Select “Sign Up >”

Clients can self-enroll in Individual, Joint And IRA accounts only and are unable to enroll in other accounts (e.g. Trust, 529's, etc.).



1 Enter the following into the form:

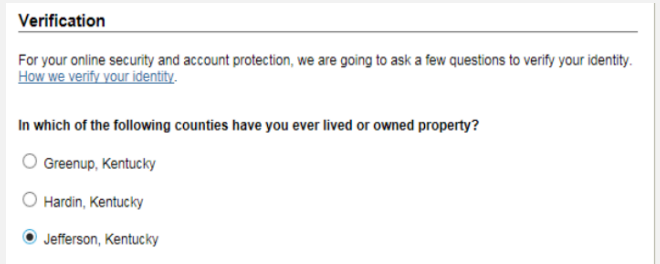
- First Name
- Last Name
- 8-digit Account Number
- Date of Birth
- Social Security Number
- State
- Zip Code

Then click the “Next” button.

If you do not know your new account number, contact your Advisor.

# Self-enrollment for Mattern Wealth Management Access Online

- 2** For online security and account protection purposes, you will be asked multiple questions to verify your identity. Once all questions are answered correctly, please hit the “Next” button.



**Verification**

For your online security and account protection, we are going to ask a few questions to verify your identity. [How we verify your identity.](#)

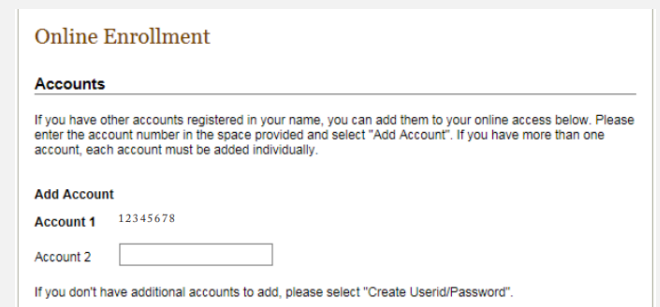
In which of the following counties have you ever lived or owned property?

Greenup, Kentucky

Hardin, Kentucky

Jefferson, Kentucky

- 3** If you have more accounts you want to view online, add each account number individually on this screen. To add an account, enter your 8-digit account number in the field, and hit the “Add account” button.



**Online Enrollment**

**Accounts**

If you have other accounts registered in your name, you can add them to your online access below. Please enter the account number in the space provided and select "Add Account". If you have more than one account, each account must be added individually.

**Add Account**

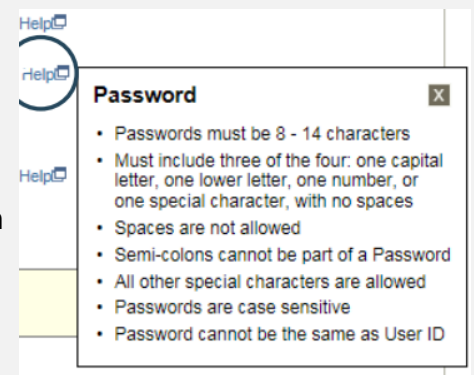
Account 1 12345678

Account 2

If you don't have additional accounts to add, please select "Create UserID/Password".

- If you do not know your new account number, contact your Financial Advisor. Once all your account numbers have been entered, or if you have no additional accounts to add, click on “Create UserID/Password” button to continue.

- 4** Create your User ID and password for your online account. Click the “Help” button for more information and password requirements. To continue, click “Submit”.



**Password**

- Passwords must be 8 - 14 characters
- Must include three of the four: one capital letter, one lower letter, one number, or one special character, with no spaces
- Spaces are not allowed
- Semi-colons cannot be part of a Password
- All other special characters are allowed
- Passwords are case sensitive
- Password cannot be the same as User ID

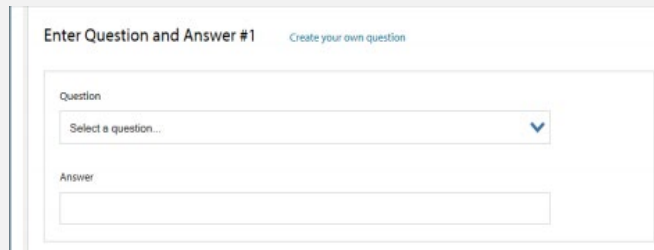
- 5** Once you hit “Submit” you should see a message on the screen telling you that “You have successfully created your User ID”. To continue, click “Login” at the bottom of the screen.

Login using your new User ID and password, created in Step 4, and click “Go”

# Self-enrollment for Mattern Wealth Management Access Online

- 6 You will be asked to create 3 security questions. You can pick a question from the dropdown list or create your own question by clicking the link.

*Please note: all answers must be at least four characters (including spaces) and no two answers can match.  
Answers are not case sensitive.*



The screenshot shows a form titled "Enter Question and Answer #1" with a link "Create your own question". Below the title is a "Question" section with a dropdown menu labeled "Select a question..." and a blue downward arrow. Below that is an "Answer" section with a text input field.

- 7 You can skip the tour by clicking "Get Started" at the top of the page.

Next you will be taken to the online access agreement. After you have reviewed the online terms and conditions, you will need to check all the boxes for Online Access Agreement, NYSE, NASDAQ, and OPRA at the bottom of the screen. Click on the Submit box to continue your online account.

