Account access when you need it

Online 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 financial professional, can help you make more informed investment decisions.

Wealthscape Investor

View the information you need—when you need it—by logging into Wealthscape Investor and save the more complex aspects of your portfolio for discussion with your Lincoln Financial Advisors financial professional.

Quickly view your account information

With your online brokerage account, you'll be able to:

- Customize the layout of your account information screens to sort and filter the data you want to focus on.
- Get real-time trade order status.
- Print or save copies of key account documents, such as statements, tax documents and trade confirmations.
- Check your positions in selected annuities.

Explore valuable market and research data[1]

You'll have access to a broad range of information you can use to track your portfolio and gain insight into market events, including the following:

- Dynamic charts and analytics
- Powerful investment screeners
- Comprehensive company profiles and fundamentals
- World overview perspective, including index listings and new headlines
- Economic overview with one-click access to five-day economic calendar
- User-created watch lists to monitor specific securities

Utilize optional online services

With these optional online services, you have easy access to information.

Account downloads

You'll be able to easily monitor cash flow, track expenses and access tax information:

- Download your account data to Quicken® for easy analysis.
- Import eligible tax forms from Wealthscape Investor into TurboTax®, H&R Block and TaxAct.

eDelivery

Simplify your recordkeeping by signing up for eDelivery.

- Suppress paper mailings of account statements, trade confirmations, prospectuses, shareholder reports, tax documents and proxies.
- You'll receive an email letting you know when a new document is available for viewing online.

Online Bill Pay[2]

Online Bill Pay can help you save time by streamlining the hassles associated with bill payment and management. With Complete Bill Management and Small Business Edition, you can

- Receive, review, pay and organize bills in one place.
- View up to 12 months of bill payment history.
- Schedule automatic and/or recurring payments and payment rules.
- Setup email alerts letting you know when a bill arrives, is coming due, and has been paid.
- Run reports by payee, date, funding account and payment status.

Ask your Lincoln Financial Advisors financial professional for additional information on the availability of online Bill Pay.

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

[2]Complete Bill Management and Small Business Edition features are not appropriate for Retirement or Lincoln Premier Series clients.

Wealthscape Investor mobile

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

Mobile Check Deposit

Take advantage of a quick, secure and efficient way to deposit checks into your brokerage account. Simply snap a picture of the check, key in the amount and select the account to receive the deposit.

Getting started

Follow these simple steps to obtain a Wealthscape Investor user ID and password:

- Go to LFA-Sagemark.com.
- Choose Access from the *My Accounts* menu.
- Click the *Wealthscape Investor* link under the *Reference Materials Access* section to self-register.

For your added security

Wealthscape Investor passwords must be reset every 365 days and can be reset at any time.

- You will receive a login warning message five days before the password's expiration date if you log in during this time frame.
- User IDs will become inactive if you don't log on once every 365 days.
- Two-factor authentication will be required for logins considered "high-risk." If needed, a one-time PIN (OTP) will be provided and must be entered in addition to a user ID and password.
- Biometric Authentication—verifying user identity via biological characteristics such as fingerprint, face or voice—is available on the mobile app.

System requirements

Supported browsers and operating systems

To ensure full functionality, Wealthscape Investor users are encouraged to utilize only supported browsers, operating systems and native applications to access the Wealthscape Investor and Wealthscape Investor Mobile platforms.

Follow these simple steps to review the most up-to-date list:

- Visit www.WealthscapeInvestor.com/lfa
- Select the browser support information link

Learn more about Wealthscape Investor

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

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