

Wealthscape Investor: IDs, Passwords, and Usernames

Register for a New User ID

The Wealthscape Investor new user registration feature enables the client to self-register for access.

Prior to attempting to register for a new user ID, the client must be prepared with an active National Financial Services LLC (NFS) brokerage account number.

Go to [AvantaxWealth.com/client-resources](https://www.avantaxwealth.com/client-resources) and click the "Access Wealthscape Investor" button.

1. On the Wealthscape Investor Sign In page, select **Register**.

Sign In

Username

Remember me

Password

[Forgot Password?](#)

Please review our [browser support information](#).

Usage of this website is subject to the [Terms of Use](#) and your other agreements with your broker-dealer. By signing in, you consent to the use of cookies as described in the [Privacy Policy](#).

Register Now

Verify Your Identity

Last 4 Digits of Your SSN [Don't have a SSN?](#)

First Name

Last Name

Date of Birth

Cancel

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- Enter the following:
 - Last four digits of Social Security number (SSN)
 - First and Last Name
 - Date of Birth
- Select **Next**.
- Enter the nine-digit NFS brokerage account number, and select **Next**.
- Enter a new password by following the Password Guidelines, and then select a security question and answer (SQA) information.
- Select **Next**.

A Confirmation states that the registration was successful and provides the 10-digit user ID. Print the Confirmation by selecting the **Print** icon.
- Select **Continue to Home Page** (not shown).

Change a Password

Clients can change the password associated with their user IDs or usernames. The user ID and password uniquely identifies a user and ensures secure access to that user's authorized brokerage accounts.

A user has up to three attempts to enter the correct password when signing into Wealthscape Investor. After the third failed attempt, the password becomes deactivated.

NOTE

If a password becomes deactivated, clients must contact their broker-dealers to have the password reset.

- Select **User Preferences > Change Password**.
- In the Enter Current Password box, enter the password used to log in for the current session.

Enter Current Password

Create New Password

Password Strength: Weak

Retype New Password

Password Guidelines

Your password **must** be 6-20 characters.
Note: You may not reuse a previous password.

What is a strong password?

To create a strong password, Fidelity recommends your password include the following:

- At least one special character: % ' () + , . - / : ; = ? \ ^ _ | ~ ! \$ @
- No easily recognized sequences (e.g., 12345 or 11111)
- No personally identifiable information (e.g. Social Security Number, telephone number, or date of birth)

Example of a strong password:
KingHenryThe8%^(

Next

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3. In the Create New Password box, enter a new password that conforms with the Password Guidelines.
4. In the Retype New Password box, enter the new password again.
5. Select **Next**.

A message confirms that the password has been successfully changed. Users must enter this new password the next time they sign in to Wealthscape Investor.

Change a Username

Clients can create a custom username to represent their 10-digit user ID for use in signing into Wealthscape Investor and Wealthscape Investor Mobile Apps.

NOTE

If the client creates a custom username, the client will be required to sign in using the new Wealthscape Investor Sign In page; Mobile App users will be required to download and sign in with the new Wealthscape Investor App. Using a custom username, clients will not be able to sign in using the legacy myStreetscape Sign In page or Mobile App.

1. Select **User Preferences > Change Username**.
Refer to the on-screen guidelines for choosing a valid username.
2. In the Enter New Username field, enter the new username.
3. Select **Check Availability** to ensure that the username has not already been taken.
 - If the username is not available, a message displays. Repeat from step 2.
 - If the username is available, a confirmation message displays.

The screenshot shows two parts of a user interface. The top part is titled 'Create Your New Username' and includes a text input field with 'Username1', a 'Check Availability' button, and a 'Username Guidelines' box. The guidelines list rules such as 'Use 9 to 15 letters and/or numbers' and 'Do not use symbols, punctuation marks, or spaces'. Below this is the 'Enter Your Password' section, which has a 'Password' label and an empty text input field. A blue 'Next' button is at the bottom.

4. Enter the login password in the Password box.
5. Select **Next**.
6. Select **Continue to Home Page** (not shown).

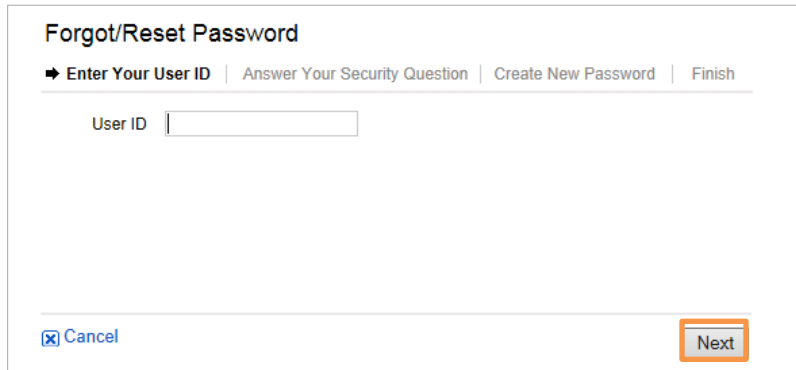
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Forgot/Reset Password

NOTE

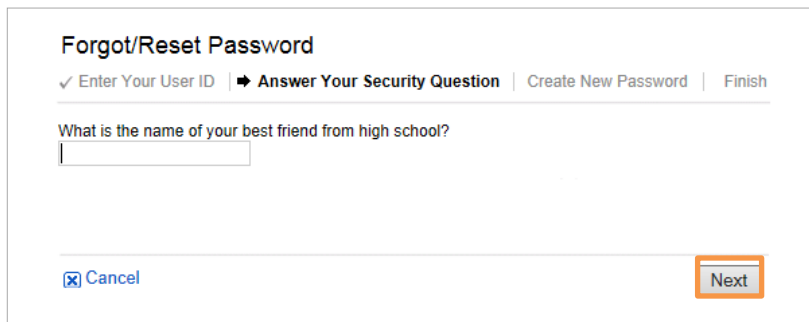
Clients who forget their user IDs must contact their broker-dealers to resolve.

1. On the Wealthscape Investor Sign In page, select **Forgot Password?**
2. Enter either the Wealthscape Investor user ID or username, and select **Next**.



The screenshot shows the 'Forgot/Reset Password' page. At the top, there are four navigation links: 'Enter Your User ID' (highlighted with a right-pointing arrow), 'Answer Your Security Question', 'Create New Password', and 'Finish'. Below the navigation is a text input field labeled 'User ID'. At the bottom left is a 'Cancel' button with a close icon, and at the bottom right is a 'Next' button highlighted with an orange border.

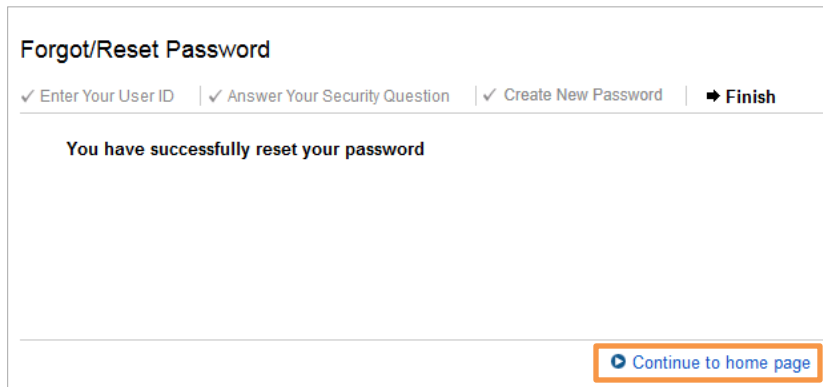
3. If a security question is on file, enter the answer and select **Next**.
OR
If a security question is not on file, a message instructs either to enter a user ID and password back on the Sign In page or to contact your firm to reset the password (not shown).



The screenshot shows the 'Forgot/Reset Password' page. At the top, there are four navigation links: 'Enter Your User ID' (with a checkmark), 'Answer Your Security Question' (highlighted with a right-pointing arrow), 'Create New Password', and 'Finish'. Below the navigation is a text input field with the question 'What is the name of your best friend from high school?'. At the bottom left is a 'Cancel' button with a close icon, and at the bottom right is a 'Next' button highlighted with an orange border.

4. In the Create New Password box, enter a new password that conforms with the Password Guidelines.
5. In the Retype New Password box, enter the new password again.
6. Select **Next**. A message confirms that the password was successfully reset.

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Forgot/Reset Password

✓ Enter Your User ID | ✓ Answer Your Security Question | ✓ Create New Password | ➔ **Finish**

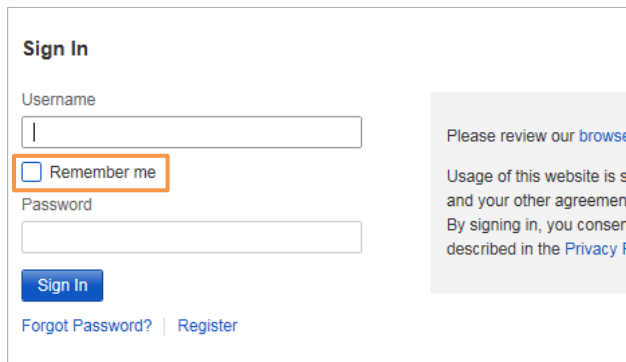
You have successfully reset your password

[Continue to home page](#)

7. Select **Continue to home page**.

Remove a Saved ID

A client can remove a saved ID from the Wealthscape Investor Sign In page if they previously chose the "Remember me" check box:



Sign In

Username

Remember me

Password

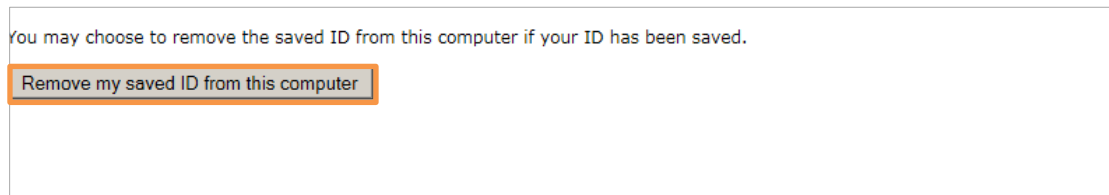
[Sign In](#)

[Forgot Password?](#) | [Register](#)

Please review our [browse](#)

Usage of this website is s
and your other agreemen
By signing in, you consen
described in the [Privacy F](#)

1. Select **User Preferences > Remove My Saved ID**.
2. Select **Remove my saved ID from this computer**.



You may choose to remove the saved ID from this computer if your ID has been saved.

[Remove my saved ID from this computer](#)

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6333 N. State Highway 161, Fourth Floor, Irving, TX 75038.