

FirstClearing

A trade name of Wells Fargo Clearing Services

Enroll for Access Online

If you would like to have online or mobile access to your Advantage Program, IRA, or Investment (Brokerage) account:

1. Select the “Sign Up” link from your firm’s Access Online login screen.
2. Enter your account information and answer a few personal questions to verify your identity.
3. Once verified, enter the account numbers you would like to view online.
4. Create a user ID and password to access your accounts.
5. To complete your online enrollment, create three security questions and answers for future password resets.
6. Upon your initial login, you will be presented with an Online Agreement which will need to be reviewed and accepted only once.

For enrollment assistance, please contact Access Online Support at 1-877-488-3748, 24 hours a day, 7 days a week.

The image displays three screenshots of the FirstClearing online enrollment process. The top screenshot shows the 'Account Login' screen with a 'Sign Up >' link, input fields for 'User ID' and 'Password', a 'GO' button, and links for 'Forgot Password >' and 'Forgot User ID >'. The middle screenshot shows the 'Online Enrollment' progress bar with four steps: 'Enter Information' (1), 'Verification' (2), 'Accounts' (3), and 'Create User ID' (4). The 'Enter Information' step is active, showing a form with a 'First Name' field and a note: 'Please enter the following information to create your userid and password. All fields are required.' The bottom screenshot shows the 'Brokerage Overview' page for account D1. It displays a 'TOTAL VALUE' of \$2,036,049 and a 'TODAY'S CHANGE' of -\$81,591 (-3.01%). Below this is an 'Account Summary' table and a 'Holdings Snapshot' table.

| Account # | Securities Market Value | Today's Change | Cash & Cash Adj. | Margin Balance | Account Value |
|-----------------|-------------------------|---------------------|----------------------|-----------------------|-----------------------|
| 0123 | \$95,789.40 | +150.00 | \$150,413.87 | -\$90,021.76 | \$186,282.49 |
| 7890 | \$2,530,462.00 | -\$1,487.68 | -\$743,998.79 | \$1,600,000.00 | \$1,877,485.71 |
| On Total | \$2,626,251.40 | -\$61,097.62 | -\$593,584.92 | \$1,610,000.00 | \$2,036,049.20 |

| Asset Class | Market Value | Today's Change |
|-------------|--------------|--------------------|
| Stocks | \$166,787.22 | +\$180,481 (+3.2%) |

