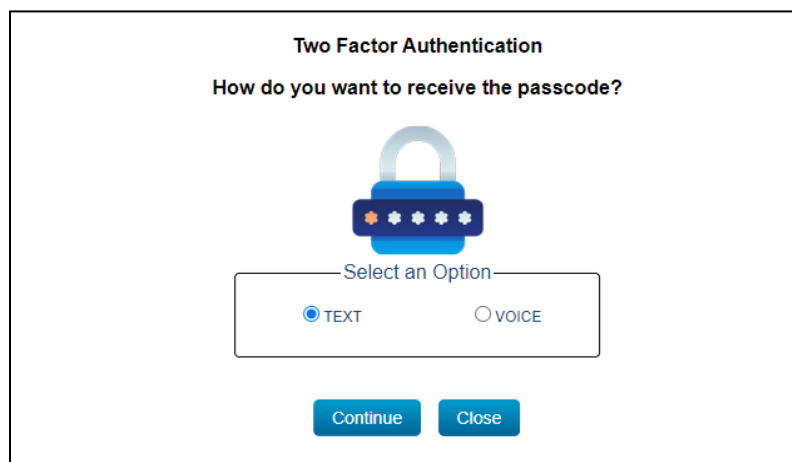


Wealth Management Online–User Guide Two Factor Authentication (2FA)

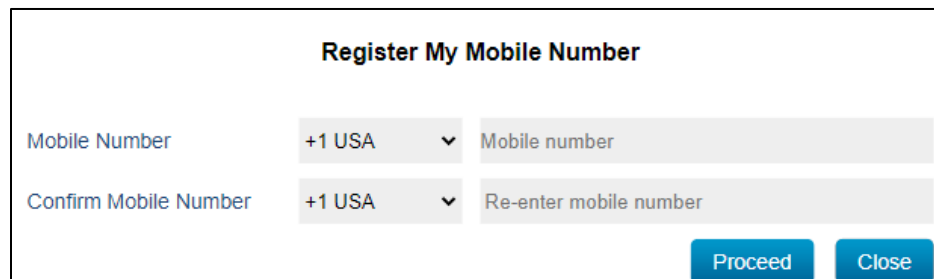
Complete the Registration for TEXT

- Log in as you normally would by entering your Login ID and Password. The **Two Factor Authentication Setup** screen appears with the option to register your number for TEXT or Voice. TEXT is the default selection.



The screenshot shows a screen titled "Two Factor Authentication" with the question "How do you want to receive the passcode?". Below the question is an illustration of a blue padlock with four white stars on its body. Underneath the illustration is a "Select an Option" section with two radio buttons: "TEXT" (which is selected) and "VOICE". At the bottom of the screen are two buttons: "Continue" and "Close".


- Click **Continue**
- Enter the mobile number and confirm your mobile number. Country code default is USA.
- Click **Proceed** to continue to **Register My Mobile Number**



The screenshot shows a screen titled "Register My Mobile Number". It contains two rows of input fields. The first row is labeled "Mobile Number" and has a dropdown menu with "+1 USA" selected, followed by a text input field containing "Mobile number". The second row is labeled "Confirm Mobile Number" and has a dropdown menu with "+1 USA" selected, followed by a text input field containing "Re-enter mobile number". At the bottom right of the screen are two buttons: "Proceed" and "Close".

- A 6-digit passcode is generated and sent as a Text (SMS) message to the number entered.
- Input the 6-digit passcode to **Complete Mobile Number Registration**.
- Click **Proceed**. The passcode is valid for 20 minutes after it is generated. If needed, click **Resend Passcode** to get a new passcode.

Complete Mobile Number Registration




A blue smartphone icon with a white screen displaying the word "PASSCODE" and six dots representing a passcode.

Please enter the 6-digit passcode sent to your registered mobile number. It will be valid for 20 minutes.

[Resend Passcode](#)

- You have successfully registered your mobile number - **Two Factor Authentication Setup** is Completed.
- Click **Continue** to proceed to the application.

Two Factor Authentication Setup is Completed



A blue smartphone icon with a white screen displaying a padlock and five stars, indicating successful setup.

You have successfully registered your mobile number for Two-Factor Authentication

Two Factor Authentication is required at every login after entering your Login ID and Password by entering the 6-digit passcode sent to your registered number.

Complete the Registration for VOICE

To complete the Voice option, select **VOICE** (it does not show your registered number partially displayed), you will be prompted to register a number.

- Click **Continue**

Two Factor Authentication

How do you want to receive the passcode?



Select an Option

TEXT
(*****2389)

VOICE

Continue **Close**

- Enter the number and confirm the number. Country code default is USA.
- Click **Proceed** to continue to **Register My Voice Call Number**

Register My Voice Call Number

| | | |
|----------------------|----------|-----------------------|
| Phone Number | +1 USA ▼ | Phone number |
| Confirm Phone Number | +1 USA ▼ | Re-enter phone number |

Proceed **Close**

- A 6-digit passcode is generated and sent by an automated phone message to the number entered.
- Input the 6-digit passcode to **Complete Number Registration**.
- Click **Proceed**. The passcode is valid for 20 minutes after it is generated. If needed, click **Resend Passcode** to get a new passcode.

Complete Number Registration



Please enter the 6-digit passcode sent to your registered number. It will be valid for 20 minutes.

[Resend Passcode](#)

Proceed

Close

You have successfully registered your number for– **Two Factor Authentication Setup is Completed.**

- Click **Continue** to proceed to the application.

Two Factor Authentication Setup is Completed



You have successfully registered your number for Two-Factor Authentication

Continue

Close

Two Factor Authentication is required at every login after entering your Login ID and Password by entering the 6-digit passcode sent to your registered number.

Update 2FA Phone Number – User

Log in and click **My Profile** located on the upper right.

- To update your 2FA TEXT or VOICE phone number simply input the new number and Click **SAVE** – and a confirmation message is displayed.

The screenshot shows the 'MY PROFILE' page in a web application. At the top, there is a navigation bar with 'My Profile' highlighted in a red box. Below the navigation bar, there is a header section with 'Save' and 'Cancel' buttons, and a message: 'Your profile has been updated.' The main content area is divided into sections: 'Login Information', 'Email', 'Text', and 'Voice'. The 'Text' and 'Voice' sections each have a dropdown menu for the country (set to '+1 USA') and a text input field for the phone number. Red arrows point to the phone number input fields in both sections. The 'Text' section shows the number '6462062309' and the 'Voice' section shows '7326326161'. The 'Email' section shows the email address 'lschreiner@f-tel.com' and a notification checkbox that is checked, with a dropdown for priority set to 'Normal'.

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WELCOME | HELP | FAQ | **My Profile** | Logout

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REPORT - STATEMENT - CONSOLIDATIONS - MAIL - DOCUMENTS - ADMIN - QUICKEN -

MY PROFILE

Save Cancel

Your profile has been updated.

Login Information

NAME* Lisa Schreiner (User name) LOGIN NAME* adminisa (Login name for login)

NEW PASSWORD CONFIRM NEW PASSWORD

Email

EMAIL: lschreiner@f-tel.com NOTIFICATION (Please notify me when I receive an email with at least Normal priority.)

Text

+1 USA 6462062309

Voice

+1 USA 7326326161