



# Your guide to using Wealthscape Investor<sup>SM</sup>

Online brokerage tools and resources



## On-demand access to accounts, positions and balances

Get the most out of your brokerage account with Wealthscape Investor<sup>SM</sup>, your customizable investor portal. You get 24/7 access to your account information so you're more informed and can better work with your financial professional to help you reach your goals.

### You can take advantage of:

- A single point of access to account information on your desktop and mobile devices
- Self-service capabilities, including market data and research tools, and mobile check deposit
- Paperless e-notifications for new documents



## Register online:

To get started, you must register for online access at [wealthscapeinvestor.com/mmlis](http://wealthscapeinvestor.com/mmlis). The registration function allows Wealthscape Investor<sup>SM</sup> users to self-register without assistance from your financial firm, thus you obtain a user ID and establish a PIN yourself.

- 1 | Log on to [wealthscapeinvestor.com/mmlis](http://wealthscapeinvestor.com/mmlis) and click the **Register Now** link.
- 2 | Verify your identity by entering the last four digits of your Social Security number (SSN), your first and last name and date of birth. Select **Next**. Please note, if you do not have an SSN and only have a TIN, please contact your registered representative.
- 3 | Enter your account number and select **Register**.
- 4 | Create a personal identification number (PIN) and security question and answer.
- 5 | A confirmation number will display, indicating registration was successful.



## Stay connected with the Wealthscape Investor<sup>SM</sup> Brokerage Mobile app:

Download the Wealthscape Investor<sup>SM</sup> Brokerage Mobile app for your tablet and smartphone and tap into your account when you're on the go. The mobile app allows you to:

- Get access virtually anytime.
- Check your account balances, positions and history.
- View market information.
- Create watch lists and price trigger alerts.

Get the free mobile app from the Apple Store or Google Marketplace to access your account from virtually anywhere.



## Access your account information:

Once your registration is complete, you may access your accounts, positions and balances online.

- 1 | Log in to your account at [www.wealthscapeinvestor.com/mmlis](http://www.wealthscapeinvestor.com/mmlis).
- 2 | Select the account you wish to view from the list in the left-column.
- 3 | Select the tabs at the top of the page to view your account holdings, activity updates and two years of transaction history.



You can customize the layout of your Account Positions screen to sort and filter the data you want to focus on.

## Create a custom username:

The Settings Function allows you to create a custom alphanumeric username to use on both the desktop and mobile app. Usernames can contain nine to fifteen letters and/or numbers, and must contain at least one letter. Symbols, punctuation marks and spaces are not allowed. Custom usernames must be created on the Wealthscape Investor desktop website.

- 1 | Click the **Settings** menu.
- 2 | Select **Change** username.
- 3 | Enter new **Username**.



Visit [www.wealthscapeinvestor.com/mmlis](http://www.wealthscapeinvestor.com/mmlis) to register for online access today!

## Update your account profile:

The Settings function allows you to customize your account name and account pages, change your password and establish security questions.

- 1 | Click on **Settings** in the upper right corner on your account screen.
- 2 | Choose from the list of user options the task you would like to perform and follow the instructions.



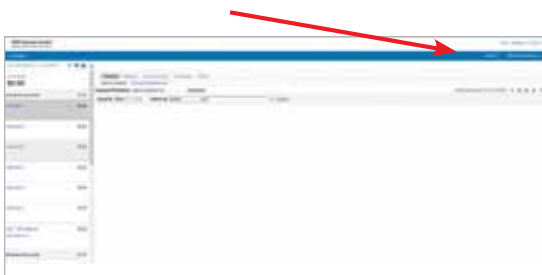
## Utilize market data and research tools:

The website offers a broad range of information you can use to track your portfolio and gain insight into market events. You have access to detailed investment profiles, comprehensive company profiles and fundamentals, and dynamic charts and analytics.

- 1 | Access **Markets & Research** through the link in the upper right-corner on our account screen.
- 2 | Select from a list of options, including market overviews and watch lists, investment quotes and fundamentals, and screeners to help you select investments.



The Snapshot view provides detailed company information and overview data.



The Market Overview screen offers you access to robust tools, including new investment screens.

## Access key documents:

With Wealthscape Investor<sup>SM</sup>, you'll always have access to your account history, including statements, confirms, tax documents and correspondence. You can also download your Wealthscape Investor<sup>SM</sup> data directly into Quicken to integrate account information, monitor cash flow and track expenses. To view your account history:

- 1 | Log in to your account.
- 2 | Select the **Documents** tab at the top of the page.
- 3 | Select one of the links below the Documents tab for the history you want to view.

In addition, in the Tax Documents section, you can import your eligible tax forms into TurboTax<sup>®</sup> and H&R Block.

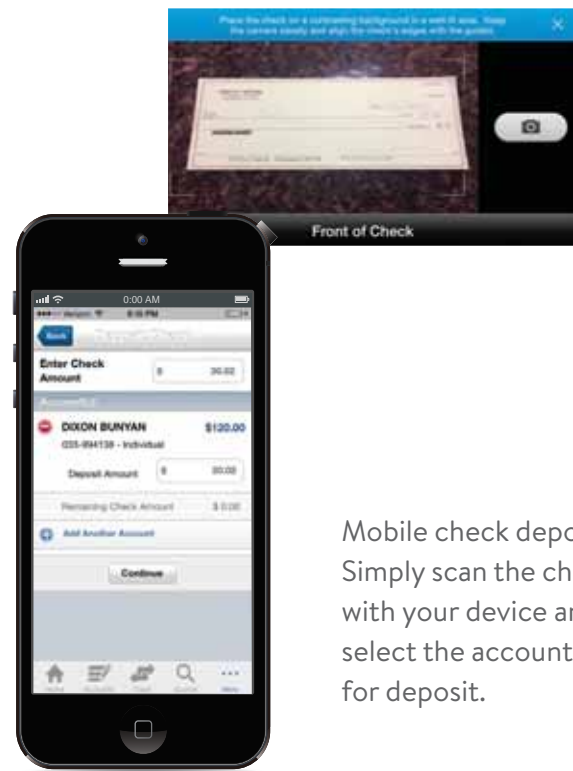


## Deposit checks through the Wealthscape Investor<sup>SM</sup> Brokerage Mobile app:

Through the Wealthscape Investor<sup>SM</sup> Brokerage Mobile app, Mobile Check Deposit allows users a quick and cost-efficient way to deposit checks for processing, straight from their mobile device. Follow these quick steps:

- 1 | Open the Wealthscape Investor<sup>SM</sup> app on your device.
- 2 | From the home screen, select **More**, then **Money Movement**, then **Deposit Check**.
- 3 | Snap a photo of the front and back of the check using the camera on your device.
- 4 | Follow the prompts to enter the deposit amount and desired account(s). You may split the deposit among up to five different brokerage accounts.
- 5 | Verify the deposit details and submit the deposit.

The mobile deposit is immediately sent to MML Investors Services for review and approval. Once approved, the deposit is transmitted to the bank for processing and posted to the brokerage account. Deposits submitted on a business day prior to 4 p.m. ET and in good order will be posted the same business day.



Mobile check deposit: Simply scan the check with your device and select the account for deposit.

## Initiate money movement:

You can initiate money transfers and view the status of any pending transfers. However, the money movement feature is entitlement-based and your Registered Rep must request the functionality for you.

- 1 | Click on **Service > Transfer/Withdraw Money**.
- 2 | Select where to transfer money to and the amount. Depending on your account profile, you can transfer using EFT, check disbursement or to another brokerage account.
- 3 | Click **Verify** to display details. If no changes are needed, click **Submit**.
- 4 | The confirmation window will appear with a confirmation number for submission.
- 5 | To check status on any pending transfers, select **Service > Pending Transfers** from the menu bar.

The screenshot shows a web form titled "Transfer/Withdraw Money". It has two dropdown menus: "Where do you want to transfer FROM?" and "Where do you want to transfer TO?". Below these are three radio button options for the destination bank, all set to "JPMORGAN CHASE BANK". The first is the user's bank, the second is another JPMorgan Chase Bank, and the third is a pending transfer. An "Amount" field is set to "1,000.00". There are "Cancel" and "Verify" buttons at the bottom.

## Go green by going paperless:

Sign up for eDelivery to simplify your recordkeeping with electronic storage of statements, trade confirmations, prospectuses, shareholder reports and other eligible correspondence. You'll receive an email letting you know that a new document is available for viewing.

- 1 | Log in to your account, select **Document Delivery Instructions** from the Service Menu.
- 2 | Click an account and select the documents you'd like to receive via eDelivery.
- 3 | Click the **Save This Account** button and the **I Agree** button to accept the terms.

With eDelivery, you can take advantage of convenient and timely email notices, instant access to your documents, enhanced security and identity theft protection and simplified recordkeeping.

Sign up for eDelivery to help simplify your recordkeeping and reduce paper clutter.

The screenshot shows a form titled "Document Delivery Instructions". It explains that instead of paper-based mail, users will receive e-mail alerts. There is a table with two columns: "Individual (I)" and "Not Enrolled". Below the table is an "E-Mail Address" dropdown menu. A section titled "Document Delivery Instructions" contains a list of document types with radio buttons for "Electronic Delivery" and "U.S. Mail". The "U.S. Mail" option is selected for all items. At the bottom, there are "Clear" and "Save This Account" buttons.

All screenshots are for illustrative purposes only.



This material does not constitute a recommendation to engage in or refrain from a particular course of action. The information within has not been tailored for any individual.

Use of the Wealthscape Investor<sup>SM</sup> Brokerage Mobile app requires an active Online Brokerage Account.

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National Financial Services LLC, Member NYSE, SIPC, 200 Seaport Boulevard, Boston, MA 02210.

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