

Albridge Registration Instructions

Albridge Wealth Reporting provides a secure way for you to view your accounts, check the holdings, and run in-depth reports. Albridge is especially helpful for its ability to consolidate account information from multiple companies, so that you can see your accounts at one, convenient place online. Whether your investments are with a single company or diversified across multiple product vendors, Albridge is a great place to start.

The screenshot shows the Albridge Wealth Reporting website. The header includes the Albridge logo and navigation links for Disclaimer, Security, and Contact Us. On the left, there is a Log In section with a User Name input field and a Submit button. Below this are links for password help and registration help. The main content area features a prominent yellow Registration button, which is circled in green. A green arrow points from this button towards the registration instructions on the right. The right side of the page contains a welcome message and a brief overview of the service. The footer includes the release date (21.1.0.0), copyright information for Albridge Solutions, Inc., and the VeriSign logo.

Once on the website, Click the Registration button to get started. Initial registrations will be processed within 24 business hours of requesting access.

The registration form is titled "Registration:" and contains the following fields and instructions:

- Please enter your Social Security Number and Client Temp Password:**
- All fields are required.**
- Social Security Number:** (e. 111223333) with an empty input field.
- Client Temp Password:** (must be 6-10 characters) with a yellow button containing the text "Living". A green arrow points to this button.
- Please type the word seen in the image:** with an empty input field.
- Security Image:** A box containing the word "thins ted" in a stylized font. A green arrow points to this image.
- New Image** link below the security image.
- Cancel** and **Next** buttons at the bottom.

Next, provide the requested information. This allows Albridge to securely gather information on all your investment accounts held through our office. The Client Temporary Password is **Living** (With a capital L). You must also type in the security image on your screen. The image you are given will be different from the one shown to the left. Once you have completed each field, click NEXT.

Registration Process: Step 1 of 2:

Please accept the User Agreement:

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Previous Decline **Accept**

Take time to look over the User Agreement in *Step 1 of 1* and Accept if you would like to continue your registration.

Providing the requested information in *Step 2 of 2* will allow you to personalize your User Name and Password.

We encourage you to make this unique to you. Should you ever be locked out of accessing your accounts we have access to your User Name but never to your password.

This is yet another step to maintain the confidentiality of your information. Make sure to make note of the User Name and Password you have chosen. Click NEXT.

Registration Process: Step 2 of 2:

*** These fields are required Please select a User Name and Password.**
User Name and Password can be alphanumeric and must be between 6 and 20 (User Name) or 6 and 20 (Password) characters.

User Name:

Password:

Confirm Password:

Please enter the following information.

Prefix:

Last Name:

First Name:

Middle Initial:

Suffix / Designation :

Day Phone:

Evening Phone:

Fax:

E-Mail:

Address:

Address2:

City:

State:

Zip Code:

Date of Birth: / /

Previous Login **Next**

Registration Confirmation:

Your registration request has been sent to your financial advisor for approval. A confirmation will be sent to you via e-mail. You will be able to login and use our services after receiving the confirmation. If you have any questions, please contact your financial advisor. Thank You.

OK

A request will be sent to our office to allow you access. Once we verify your request, you will be able to view your investment accounts. We will approve your access within 24 business hours, or you can contact us upon completion of your registration to expedite the process.

Date: June 17, 2014 at 1:32:04 PM EDT
To: [Redacted]
Subject: Consolidated Statement Approval Notification

Congratulations, your consolidated online account access is now active! Please go to the following address:
<https://www3.mainaccount.com/report/>

As a reminder, your user name is [Redacted]

For security reasons we cannot include your password in this reminder email. If you have forgotten your password, please visit <https://www3.mainaccount.com/report/>, enter your username, and on the password page click on the "Click Here" link if you've forgotten your password.
 If you have questions regarding this email, please contact:
 T. Spencer Metcalf

Once you receive an email that your registration has been confirmed, you can login and start viewing your accounts, checking your holdings, and running reports.

ALBRIDGE
Wealth Reporting

Log In > Disclaimer > Security > Contact Us

User Name
Submit

* Where do I enter my password?
* Registration Help

> What's New
Security Enhancement...

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Web Browser Information
Bookmark this page

Now you can enter your User Name and click SUBMIT which will prompt you to enter your password.

If you and others in your household have separate accounts through our office, it is possible to view them together through the Household Reports we are able to create. This drop box will allow you to choose a Combined Account Portfolio for just your accounts, or a Household Portfolio.

ALBRIDGE
Wealth Reporting™

Message Center Tour Help Disclaimer Contact Us Security

INVESTOR VERSION
Powered by Albridge Solutions

T. Spencer Metcalf MBA, CFP®
LivingStone Wealth Planning

CONTROL CENTER
Reports My Info Portfolio List Log Out

Reports Holdings by Investor

Info | Accts | Reports

1. Portfolio	Combined Account Portfolio
2. Report	Holdings by Investor
3. Date	06 / 16 / 2014
4. Run Report	Go Printer Friendly Export

If at any time during your Registration process you have questions or problems, please give us a call at 864-520-8000, and we will gladly assist you.

*Securities & Investment Advisory Services offered through Voya Financial Advisors, inc. (member SIPC)
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