

# *4myaccount!*

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## **USER GUIDE**

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**Your Internet connection gives you the convenience and comfort of instant access to your personal account information, 24 hours a day, 7 days a week. You can check your balances and positions and review trades made during the last 90 days. You can also view your statements and use Commonwealth's extensive market data and research capabilities.**

### LOGGING IN FOR THE FIRST TIME OR AFTER PIN RESET

**Please note:** Keep a copy of your PIN in a secure place for future reference. If you forget or lose your PIN, use the online form to reset it.

1. Enter the User ID and PIN provided to you by your registered representative.

**Please note:** The first time you log in, you will be prompted to change your PIN. (See the illustration below.)

2. Once again, you must enter the User ID and the PIN provided to you by your representative in the Old PIN field.
3. Then, enter a new 6- to 12-character PIN (it must be *all* numeric).
4. For verification, enter the new PIN a second time.
5. Click **Change PIN**.

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[View My Account](#) | [Login Problems](#) | [FAQ](#)

[User Options](#) > Change Expired PIN

### Pin Edit Rules and Guidelines:

- Your PIN has expired and you must now change it. After successful completion you will be directed to the login page.
- Must be numeric only.
- Must be 6 to 12 digits long.
- A single repeated digit or sequential numbers are not allowed (e.g. 111111 or 123456).
- Using your date of birth, account number, social security number, phone number, or zip code is not recommended.
- Your new PIN cannot share more than 5 digits with your user ID.

User ID:

Old PIN:

New PIN:  Retype New PIN:

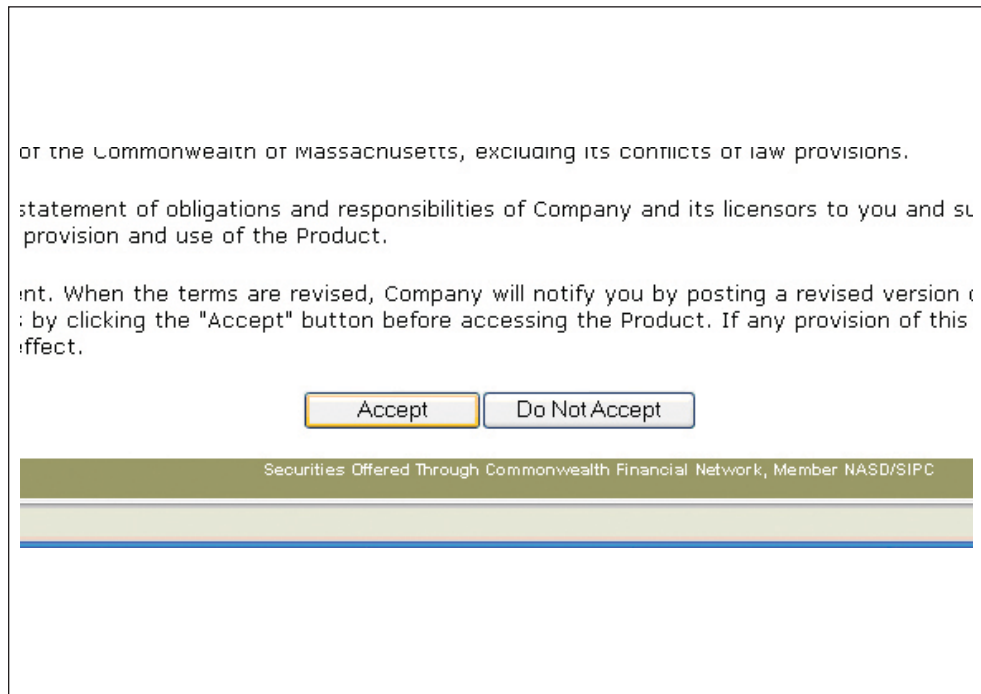
6. You will get a confirmation message, which, after a few seconds, may automatically navigate back to the *4myaccount!* homepage.



7. Log in with your User ID and new PIN.


**When logging in for the first time only, note the following steps:**

8. Read and accept the User Agreement and the NYSE Agreement.



9. Read the information for the Nasdaq User Agreement, clicking **Continue** after you finish each section.

10. Fill out the fields on the third page of the Nasdaq User Agreement and click **I Agree (Signature Confirmed)**.

  
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[View My Account](#)

(c) employed by a bank or other organization exempt from registration under federal or state securities laws to perform functions that would require registration or qualification if such functions were performed for an organization not so exempt.

I certify that I am a **Professional Subscriber**  
The phrase "Professional Subscriber" means all other persons who do not meet the definition of Non-Professional Subscriber.

**B. Signature**

Subscriber Name

Signature

Please retype your name as proof of your signature  
3/20/2006

**For Agent Use Only**  
Complete only if you are signing on behalf of the Subscriber.

Agent Name   
Enter name of person signing for Subscriber

Agent Title

<input type="radio"/> Chief Executive Officer	<input type="radio"/> President
<input type="radio"/> Chief Operating Officer	<input type="radio"/> Senior Vice-President
<input type="radio"/> Managing Director	<input type="radio"/> Vice-President
<input type="radio"/> Other (enter below)	<a href="#">Clear Selection</a>

Enter title above only if you have the same contracting authority as the listed titles but your title is different

If you signed the Agreement, make a copy for your records (electronically or otherwise). If you did not intend to sign, or signed electronically in error, click I Disagree (Cancel). To confirm your signature and the accuracy of the information above, click I Agree (Signature Confirmed) to submit the Agreement and legally bind the Subscriber to the Agreement.

11. Finish by clicking **OK**.

### VIEWING ACCOUNT INFORMATION IN THE ACCOUNT INFO TAB

To the right of the account number you would like to view, select the specific type of information you need from the Account Actions dropdown menu.

The screenshot displays the 4myaccount! web interface. At the top, the logo for COMMONWEALTH financial network is visible, along with the 4myaccount! branding. Below this, there are navigation links for 'View My Account', 'Login Problems', and 'FAQs'. A search bar with 'QuickQuote' and 'Symbol Lookup' options is present. A secondary navigation bar includes links for 'Important Legal Info', 'Privacy Policy', 'Online Acct Usage', 'Home @Content', 'User Options', 'Logout', 'Help', 'Contact Us', and 'Site Map'. The main navigation menu is divided into 'Account Info' and 'Brokerage Center'. Under 'Account Info', there are sub-tabs for 'My Portfolio', 'Positions', 'Balances', 'History', 'Account Detail', 'Order Status', 'Annuities', and 'Statements & Record'. The 'My Portfolio' tab is active, showing a table with columns for 'Account', 'Net Worth', and 'Account Actions'. The table lists one account: 'TEST' with account number 'HDS-458708 - Individual' and a net worth of '0.00'. The 'Account Actions' column for this account has a dropdown menu open, showing options: 'Select Action', 'Account Detail', 'Positions', 'Balances', 'History', 'Order Status', 'Annuities', 'Statements & Records', 'Stocks', 'Mutual Funds', 'Options', and 'Dynamic Trader'. A footer note states 'Securities Offered Through Commonwealth Financial Network.' and a 'Done' button is visible at the bottom left.

Account	Net Worth	Account Actions
TEST HDS-458708 - Individual	0.00	Select Action Account Detail Positions Balances History Order Status Annuities Statements & Records Stocks Mutual Funds Options Dynamic Trader



## VIEWING MARKET DATA IN THE QUOTES & MARKET DATA TAB

1. Under the Quotes & Market Data tab, enter the Ticker Symbol.
2. From the menu on the left, select the market data item you would like to view.
3. To obtain additional market data information, choose another option from the same menu.

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[View My Account](#) [Login Problems](#)

COMMONWEALTH *financial network* QuickQuote  [Go](#) [Symbol Lookup](#) [Important Legal Info](#) | [Privacy Policy](#) | [Online Acct Usa eContent](#) | [User Options](#) | [Logout](#) | [Help](#) | [Contact Us](#)

Account Info | Order Entry | **Quotes & Market Data** | Research | Planning | Account Services | Brokerage

Quotes & News | Markets | Dynamic Trader

Enter Symbol(s):  [Go](#) [Symbol Lookup](#)

**Quotes & News**

This area allows you to receive news and quotes, track your favorite securities, and perform fundamental analysis.

To begin:

1. Enter the symbol in the Symbol Field(search for a symbol by clicking the Symbol Lookup).
2. Click on the desired menu item to the left.

Your use of the Quotes and Market Data section of this web site is subject to the following terms. The Quotes Market Data section is made available through Fidelity Brokerage Technology Group, inc. The Quotes and Mar Data section is prepared by independent providers, which are identified as the source of the information. Independent providers are not affiliates with Licensor, as defined in the Important Legal Information link of this site, its divisions, subsidiaries or affiliates (herein "Licensor"). This information has not been reviewed by Lic Securities mentioned reflect the analysts' opinions, and are not recommendations. The materials are provided information purposes only and should not be used or construed as an offer to sell, a solicitation of an offer to buy a recommendation for any security. There is no guarantee that the information supplied is accurate, complete, timely. There is no guarantee or warranty with regard to the results obtained from its use. Past performance is an indication of future performance. There is no guarantee of suitability or potential value of any particular investment or information source. You acknowledge that your requests for information are unsolicited and shall neither constitute nor be considered investment advice.

## FINANCIAL PLANNING TOOLS IN THE PLANNING TAB

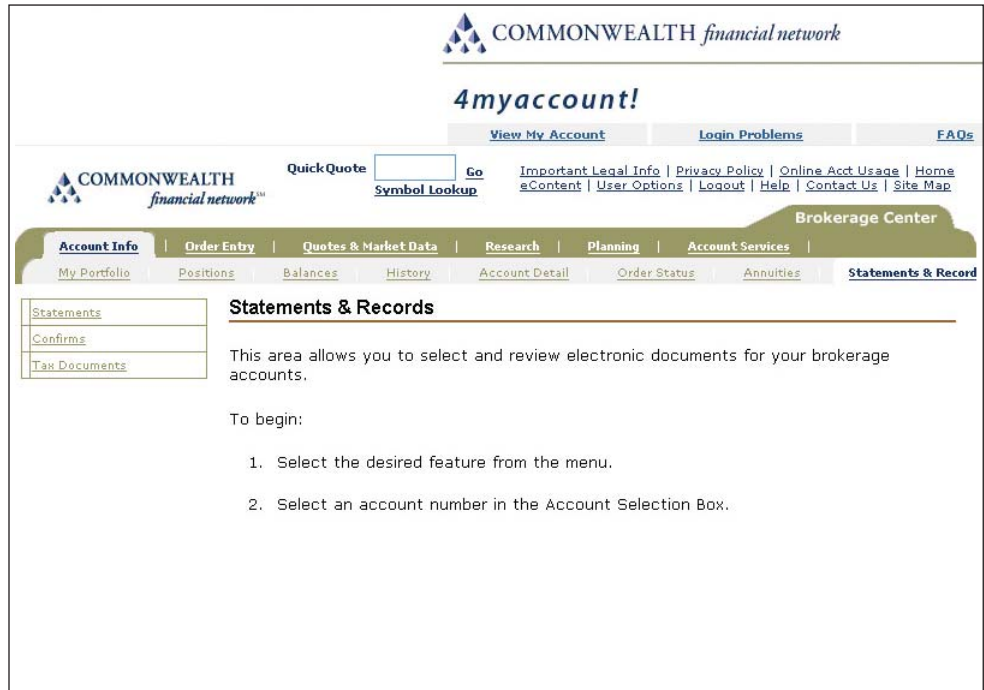
1. Choose the tool you would like to use (either under Commission Calculator or Breakpoint: Sales Charge).
2. Follow the steps associated with that particular planning device.

The screenshot shows the 4myaccount! website interface. At the top, there is a navigation bar with the logo and the text "COMMONWEALTH financial network". Below this is the "4myaccount!" logo and a navigation menu with links for "View My Account", "Login Problems", and "FAQs". A secondary navigation bar includes "QuickQuote" with a search box and "Go" button, and links for "Important Legal Info", "Privacy Policy", "Online Acct Usage", "Home eContent", "User Options", "Logout", "Help", "Contact Us", and "Site Map". The main navigation bar is labeled "Brokerage Center" and includes tabs for "Account Info", "Order Entry", "Quotes & Market Data", "Research", "Planning" (which is active), and "Account Services". Under the "Planning" tab, there is a sub-tab for "Commission Calculator" with a link for "Breakpoint: Sales Charge". The "Commission Calculator" section has a "Selected Account" dropdown menu showing "HDS-458708; TEST" and links for "Edit Account Name" and "Account Details". Below this is a section for "\* = Required Field" with three input fields: "Action \*" (a dropdown menu), "Quantity \*" (a text box), and "Price \*" (a text box). There are also radio button options for "Security Type \*" (Market Order: Yes/No, Foreign Security: Yes/No). A disclaimer states: "This commission calculator will estimate the commission for placing trades online. Commissions are subject to change without notice. If you have questions, please contact your Investments representative." At the bottom of the form are "Calculate" and "Clear All" buttons.

## ONLINE CLIENT STATEMENTS

1. To access statements, click **Statements & Records** under the Account Info tab and then click on **Statements** in the menu on the left.
2. If different from the default, select the output format in which you want to view and print the statement image: HTML or PDF.
3. Click the **Statement Date** link that represents the statement you want to view. The statement image opens in a second browser window. You can open up to five statements at a time for viewing in separate windows. If you open a sixth statement, the first statement you opened will close, and so forth.

4. To print a statement, click **Print** on the toolbar of the secondary window in which the statement image displays.



## ONLINE CLIENT TOOLS

1. If you cannot log in to *4myaccount!*, click **Login Problems**.
2. You may be able to find an answer to a question in *4myaccount!* FAQs (Frequently Asked Questions).
3. For helpful links, choose **Pro on the Go**.



## EXTENSIVE HELP MENU

Use the Help option to locate answers to most of your questions about the site and its content. This section is located under Support Center, on a screen with the heading *www.mystreetscape.com* running across the top.



## ACCOUNT INFORMATION AND MARKET DATA DESCRIPTIONS

These are the most frequently visited areas. For more information on these topics, or to find out about functionality not listed below, refer to the *4myaccount!* Help tab.

### Account Info

This tab gives you access to information about your brokerage accounts. It includes general account attributes, positions of each security held, balances, and up to 90 days of transaction history. You can also view the status of submitted orders, held orders, and canceled orders. In addition, you can view online monthly and quarterly account statements and tax documents. Positions, history, and balances are updated once a day, usually early in the morning (before 5:00 A.M. ET). They reflect information as of the previous business day and they do not change during the day. Order status is updated throughout the day.

### Order Entry

In this tab, you can electronically trade securities held in a brokerage account. After you enter an order, you can preview it. Once previewed, submit it and wait for a reference number. (Save this number for future communications about the order.)

Before being sent to the market, orders are subject to an approval-and-release process during business hours by Commonwealth. You can view orders on the Order Status window. If an order is rejected, this is where you will get your only notification.

**Please note:** Contact Commonwealth to place types of orders that are not available through *4myaccount!*.

### **Quotes & Market Data**

Quotes & Market Data contains varied and comprehensive resources, including world and national exchange statistics, sector performance summaries, fundamental data for U.S. domestic companies and industries, and historical closing prices and volume charts for listed U.S. equities.

### **Research**

Use these tools to locate stock recommendations, as well as analysis and opinions on industries, companies, financial markets, mutual funds, and the economy.

### **Planning**

This tab provides access to calculators and tools for estimating a variety of investment strategies. Using information you provide in a short, comprehensive worksheet, each calculator suggests strategies tailored to your specific situation and investment style.

### **Account Services**

Selections from this menu provide you with general information about your brokerage account, as well as access to electronic forms for adding features to your account and for maintaining some account information.