FOR YOUR INFORMATION

Wealthscape Investor℠

Once you have established your Mesirow accounts, you will have the opportunity to enroll in Wealthscape Investor℠, our online portal through National Financial Services, LLC (NFS) that offers you account access 24/7.

With convenient online access, you can check current positions and balances and receive in-depth market data allowing you to stay connected on the go.

Our clients use Wealthscape Investor primarily for:

- Account information and account balances
- Portfolio positions
- Statements and confirmations
- Tax forms
- Market news and commentary
- Quotes and market data
- Mobile check deposit

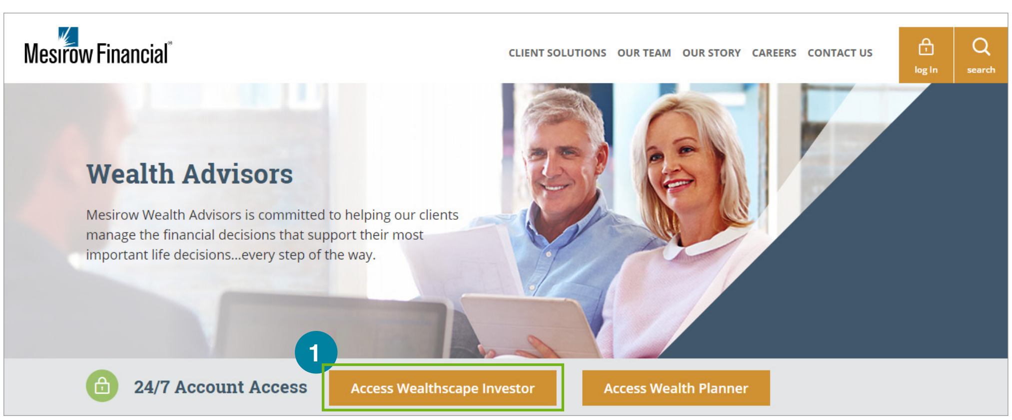
Go green

In addition to being able to access your account whenever you want to, you can also sign up for eDelivery to help simplify your recordkeeping and reduce clutter with electronic storage of statements, trade confirms and other eligible documents. You will receive an email letting you know that a new document is available for viewing.

Getting started

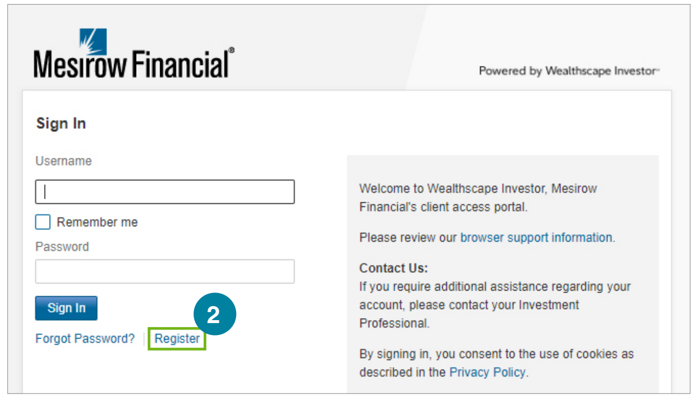
It is easy to get started.

1 Go to www.mesirowwealthadvisors.com and select Access Wealthscape Investor.



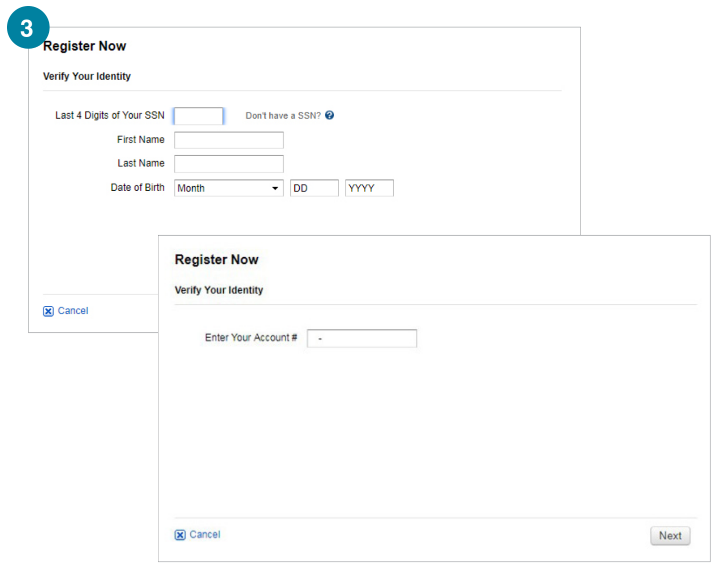
Mesirow Financial®

2 Select Register.

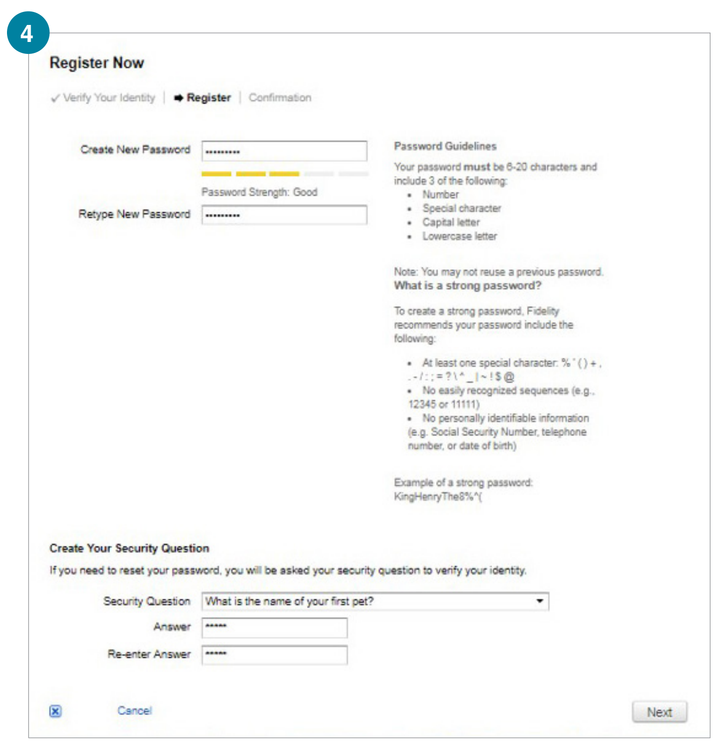


3 Register your account by entering last 4 digits of your SSN, first and last name, and date of birth.

You will then be prompted to enter your Account Number. If you do not know your Account Number, please contact your wealth advisor.

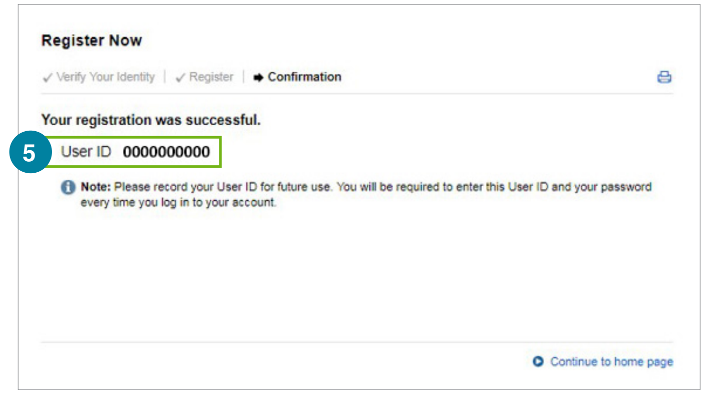


4 Once completed, the system will prompt you to create a password and create an initial security question. This security question allows you to reset your password if you become locked out of the system.



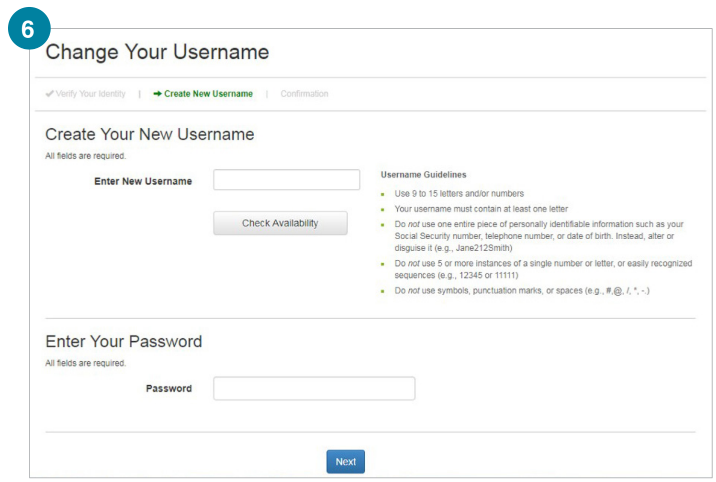
5 Once your registration is successful, you will be assigned a User ID. **Please write down your User ID.** This number will be required to enter every time you log in to your account. Later in this document we will demonstrate how to change this to a more personalized username to make it easier to remember.

After registering your account for the first time, you will be prompted to add additional security questions or skip them for now. If you skip them, the next time you login, you will be prompted to add two additional security questions.



Note: Remember to change log in number for privacy

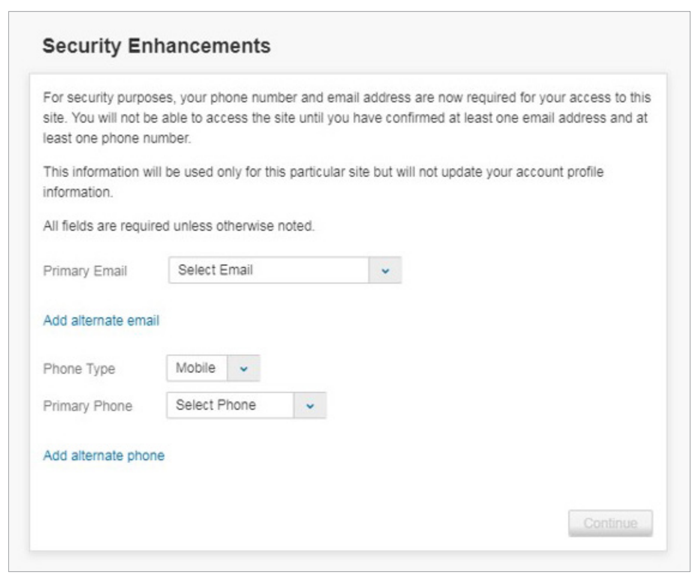
6 After the second login, you may be prompted to create a new user name, which we highly recommend. Please follow the instructions to the right of the screen to successfully create a custom username.



Your Security is Our Priority

In order to provide an additional layer of security protection, you will be asked to provide an email address and phone number.

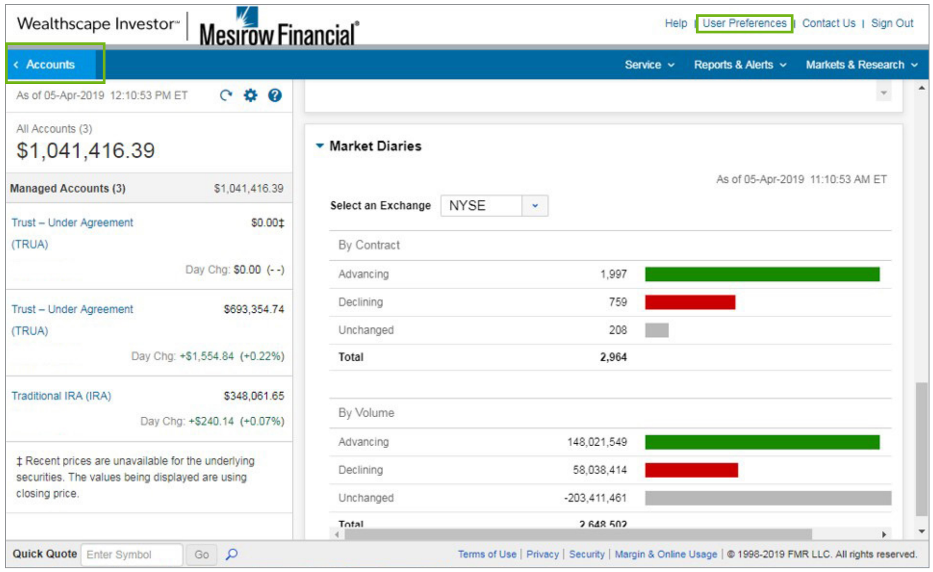
When accessing your account, you may be notified that an extra security step, called two-factor authentication, is required. The system will use your email or phone on record to authenticate your account.



Key Features of Wealthscape Investor

Now that your account has been created, you can change your User ID, password, contact information, or security questions at any time by selecting User Preferences.

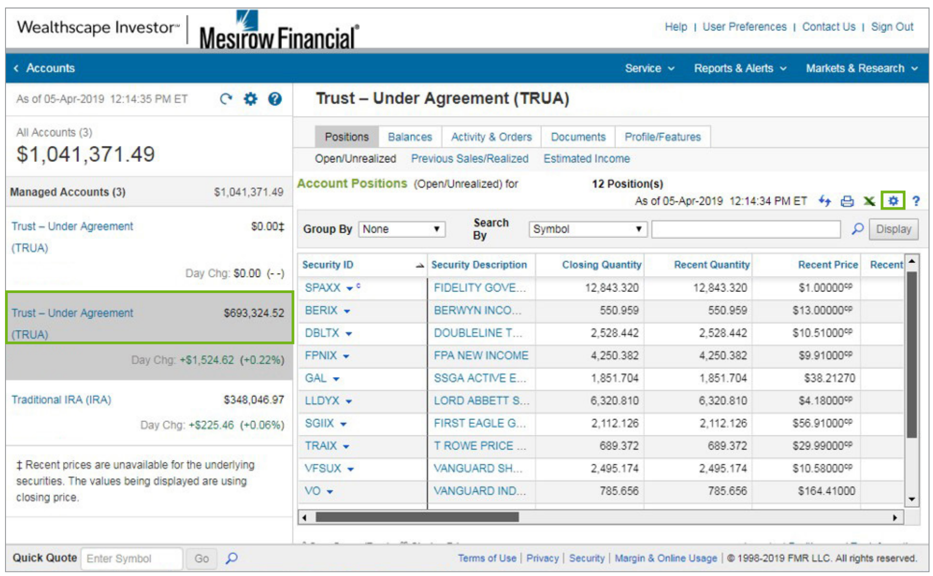
The Accounts tab on the top left is your ‘home button’ for the portal. This will display your accounts, the balances in each account and the day-to-day change in value.



When you select an account, it provides details on the account positions, balances, activity & orders, documents and profile features.

You can customize your view by clicking the gear ( ) on the right side above your account details which will let you customize your display options and provides the ability to print/export your detailed account information.

If you need assistance logging in to Wealthscape Investor, have questions about functionality, or would like to learn more about the mobile app, please reach out to your wealth advisor.



Mesirow Wealth Advisors is committed to you

Mesirow Wealth Advisors understands the challenges and pressures that individuals face when trying to manage their personal wealth, throughout the many stages and events of a lifetime. We partner with you to understand your personal goals, and then together we develop a plan designed to accumulate, grow, protect and distribute your wealth as planned. We are dedicated to helping you make the best financial decisions that support your most important life decisions.

Mesirow Wealth Advisors is part of Mesirow Financial, an independent, employee-owned firm founded in 1937. As specialists in investment, risk management and advisory services, we are committed to helping our institutional, corporate and individual clients achieve their objectives. Our professionals are inspired by an entrepreneurial desire to develop tailored solutions designed to deliver measurable results.

Visit us at mesirowwealthadvisors.com

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