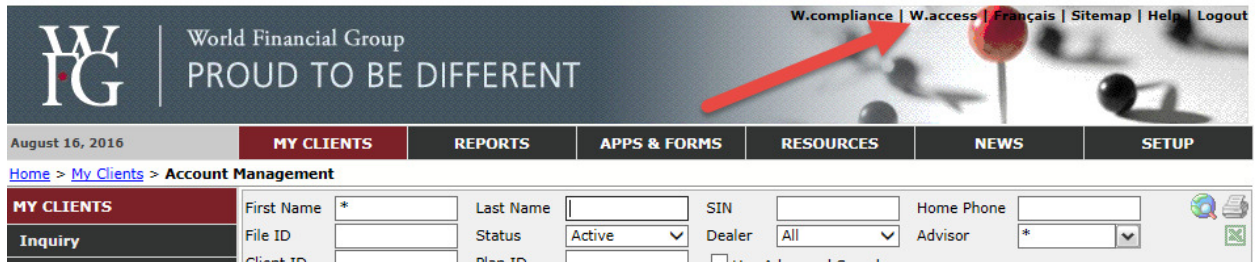


How to look up Client's Login ID on W.Connect

- 1) Login to W.Connect
- 2) Click on W.access



W.compliance | **W.access** | Français | Sitemap | Help | Logout

World Financial Group
PROUD TO BE DIFFERENT

August 16, 2016

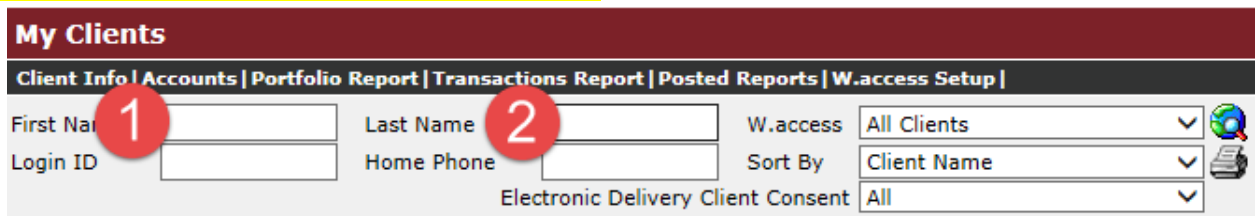
MY CLIENTS | REPORTS | APPS & FORMS | RESOURCES | NEWS | SETUP

Home > My Clients > Account Management

MY CLIENTS
Inquiry

First Name * Last Name SIN Home Phone
File ID Status Active Dealer All Advisor *

- 3) Look up the client by client by First and Last name



My Clients

Client Info | Accounts | Portfolio Report | Transactions Report | Posted Reports | W.access Setup |

First Name Last Name W.access All Clients
Login ID Home Phone Sort By Client Name
Electronic Delivery Client Consent All

Total clients found: 279

Client Name	Home Phone / Business Phone	Login ID	Last Login	Client Consent
-------------	-----------------------------	----------	------------	----------------

- 4) Once the client is Located their Login ID will be listed in the column



My Clients

Client Info | Accounts | Portfolio Report | Transactions Report | Posted Reports | W.access Setup |

First Name Last Name W.access All Clients
Login ID Home Phone Sort By Client Name
Electronic Delivery Client Consent All

Total clients found: 279

Client Name	Home Phone / Business Phone	Login ID	Last Login	Client Consent
-------------	-----------------------------	----------	------------	----------------