

## HOW TO GET ONLINE ACCESS TO YOUR FIRST CLEARING CORP/FUNDSOURCE ACCOUNTS

- What you will need:
  - User ID of your choosing (7 characters, no symbols)
  - Password of your choosing(7 characters including 1 number)
  - PIN # of your choosing (4 digits)
  - Email Address
  - All account numbers (if linking multiple accounts)
  - 3<sup>rd</sup> Party Authorization form (if linking husband's and wife's accounts) – get from Blattel & Associates
- What to do:
  - Gather the above information
  - Call First Clearing Corp/Fund Source accounts at 877-488-3748 to sign up and get a temporary password for the web site
    - First Clearing will ask for account numbers, the User ID you selected, and other basic information
  - Go online to <https://cutterco.fccaccessonline.com> (or use the web site link under the Links tab at [www.blattels.com](http://www.blattels.com))
    - Enter your User ID and the temporary password First Clearing gave you when you called them.
    - Create a new password to replace the temporary password.
    - Once that is completed, you will be taken to several questions where you are asked to either accept or decline.
    - Then you will need to verify that you qualify as a non- investment professional.
    - Finally, type in your name to be used as an electronic signature.
- CONGRATULATIONS!! YOU NOW HAVE ONLINE ACCESS!!
- What you should do while online:
  - Establish your online delivery preferences for your account(s)
    - Go to Statements and Documents on the left hand side, then go to Delivery Preferences.
    - Provide your email address as requested.
    - Select Delivery Preferences again.
    - Then you will be asked if you want to Go Paperless or if you want to select online options individually.
      - If you select online options individually, you will be taken to page asking you to indicate which options you wish to receive online. (We recommend getting Trade Confirmations and Shareholder Communications through email).
    - You will then have to enter your PIN #. This will allow you to save your changes and make changes to these options in the future.