

Pontera Client Guide

Your advisor used a software called ByAllAccounts to view, monitor, and manage your 401(k), 403(b), 457, annuity, HSA, and/or 529 education savings plan accounts. Such accounts are called “held-away accounts” because they are not held at your advisor’s primary financial institution.

Your advisor will be transitioning your held-away accounts from ByAllAccounts to a new provider, Pontera (aka FeeX). They are a trusted vendor to thousands of financial advisors and some of the largest financial institutions in the world.

Your advisor will continue to view, monitor, and manage your held-away accounts, but Pontera allows your advisor to provide additional benefits and services:

- **Held-away account trading:**

Using the Pontera platform, your advisor will now be able to trade your held-away accounts just like the rest of your portfolio. This means you will no longer receive communications from your advisor with rebalancing or trading instructions for you to execute, saving you time.

- **Proactive account link fixing:**

Pontera works a bit differently than ByAllAccounts. In the past, your advisor may have contacted you to re-link an account or send a verification code to regain access to your account. **Pontera uses an enhanced security feature in which they add a unique and secure forwarding phone number or feex.com email address to your contact information on file with your financial institution. This forwarding phone number or feex.com email address must stay on file to allow your advisor access to your account.** You may receive a notification from your financial institution that your contact information has been updated.

The forwarding phone number or feex.com email address allows both you and your advisor to complete any multi-factor authentication your financial institution may require when logging in to your held-away account. Now, your advisor can manage your account without needing you to supply the multi-factor authentication or verification codes, meaning less involvement will be required from you in keeping your account running smoothly. When you log in to your account, simply select Pontera’s forwarding phone number or email address when prompted, and the

verification code will be forwarded to your personal cell phone or email address, so you complete the login process.

This guide will show you how to connect your held-away accounts to the Pontera platform after you receive the Pontera link from your advisor:

Step 1

After clicking the link to connect your account, you will see a Welcome Page outlining the service. Please read the notification then click "GET STARTED".













HELLO JANE DOE WELCOME TO PONTERA!

THIS PLATFORM ALLOWS YOUR ADVISOR TO
ACCESS AND MANAGE YOUR ACCOUNTS.

Step 2

Select the financial institution that holds the held-away account. You can select one of the popular options listed, search for your financial institution by name, or search by entering the login URL you normally use to access the account.

Select financial institution

Or search for other financial institutions:

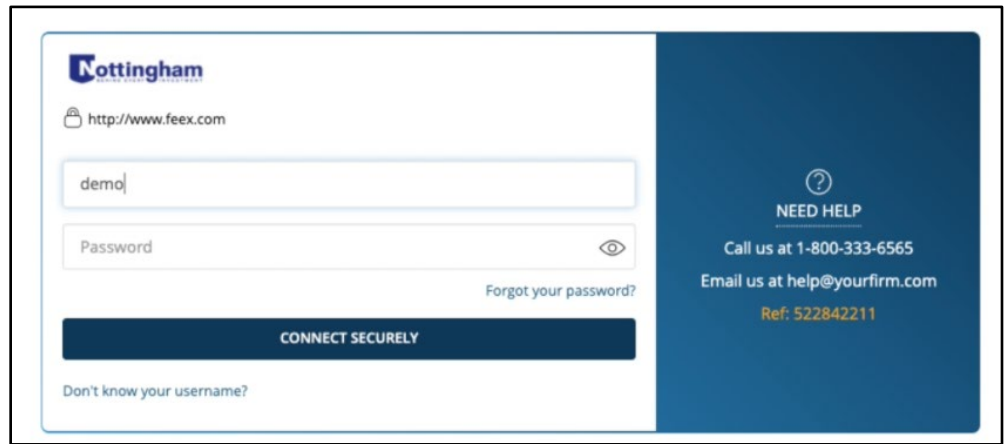
i If you're not sure what to select, please log into your financial institution account directly and copy and paste that web address (URL) into the search field above.

For example, for Fidelity copy and paste:
<https://login.fidelity.com/ftgw/Fas/Fidelity/RtlCust/Login/Init>

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Step 3

Enter the credentials you normally use to log in to your account directly. Once entered click “CONNECT SECURELY”.



Nottingham
http://www.feex.com

demo

Password

Forgot your password?

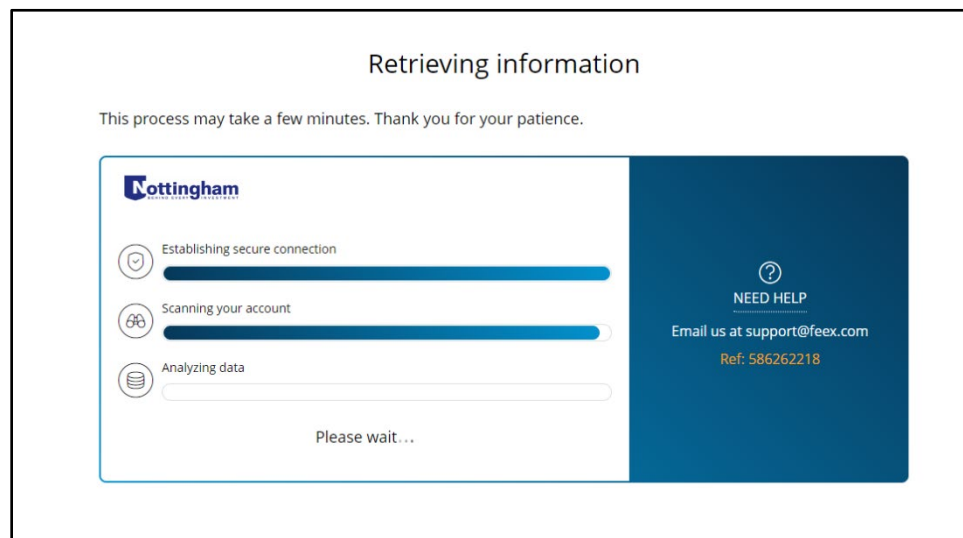
CONNECT SECURELY

Don't know your username?

NEED HELP
Call us at 1-800-333-6565
Email us at help@yourfirm.com
Ref: 522842211

Step 4

Pontera will then work to connect your account. If you usually log in via security questions, you will be asked to provide the answers. If you usually log in by receiving a one-time verification code to your cell phone or email address, you will be prompted to enter the code.



Retrieving information

This process may take a few minutes. Thank you for your patience.

Nottingham

Establishing secure connection

Scanning your account

Analyzing data





Please wait...

NEED HELP
Email us at support@feex.com
Ref: 586262218

Step 5

A unique forwarding email address or phone number (as mentioned above) may be added to your account at this point.

Before we finish, please read the reminder below.

-  A **forwarding phone number** or **email address** may be added to your account. **Please do not remove** the phone number or email address added.
-  The next time you log into your S. Nottingham Investments account, **please select the forwarding phone number or email address** added to your account. Once the verification code is sent from S. Nottingham Investments, it will be forwarded to your personal cell phone number or email address.
-  Your financial institution may notify you that your **contact information has been updated**. This is to allow Wealthcare Capital Management LLC to manage your account without having to ask you for a verification code.
-  Any messages or emails will be **forwarded to your personal cell phone or email address**.

GOT IT

Step 6

For employer-sponsored retirement accounts, select whether your current or a previous employer provides the plan. When complete, click “ADD ANOTHER ACCOUNT” if you have additional held-away accounts to add, or if you do not have other accounts, choose “FINISHED ADDING ACCOUNT”.

We found the following account!



ACCOUNT NAME	ACCOUNT TYPE	PARTICIPATION STATUS	HELD AWAY MANAGED
GOOGLE INC. 401(K) SAVINGS PLAN - S. Nottingham Investments	401(k)	<input checked="" type="radio"/> Current Employer <input type="radio"/> Previous Employer	<input checked="" type="checkbox"/>

ADD ANOTHER ACCOUNT

FINISHED ADDING ACCOUNT



NEED HELP

Email us at support@feex.com

Ref: 586262218

Thank you for connecting your account(s). If you have any questions or need further assistance, please contact your advisor or support@feex.com.

Thank you for connecting this account!

If there are additional steps needed to connect the account, our support team will be in touch with you soon to complete the process.

Alternatively, feel free to contact support@feex.com.

DONE

or

ADD ANOTHER ACCOUNT

