



Wealth Advisory Services

WEALTH ADVISORY ONLINE Enrollment Guide

May 2018

Getting Started

Two emails will have been sent to you, the first informing you of your User Identification Code, the second telling you what your password is.

To access Wealth Advisory Online and view your account information go to the 1st Source website at:

<https://www.1stsource.com/>

- Select Wealth Advisory Online from the drop down box at the top of the main 1st Source page.
- Click the Arrow.



Access Wealth Advisory Online

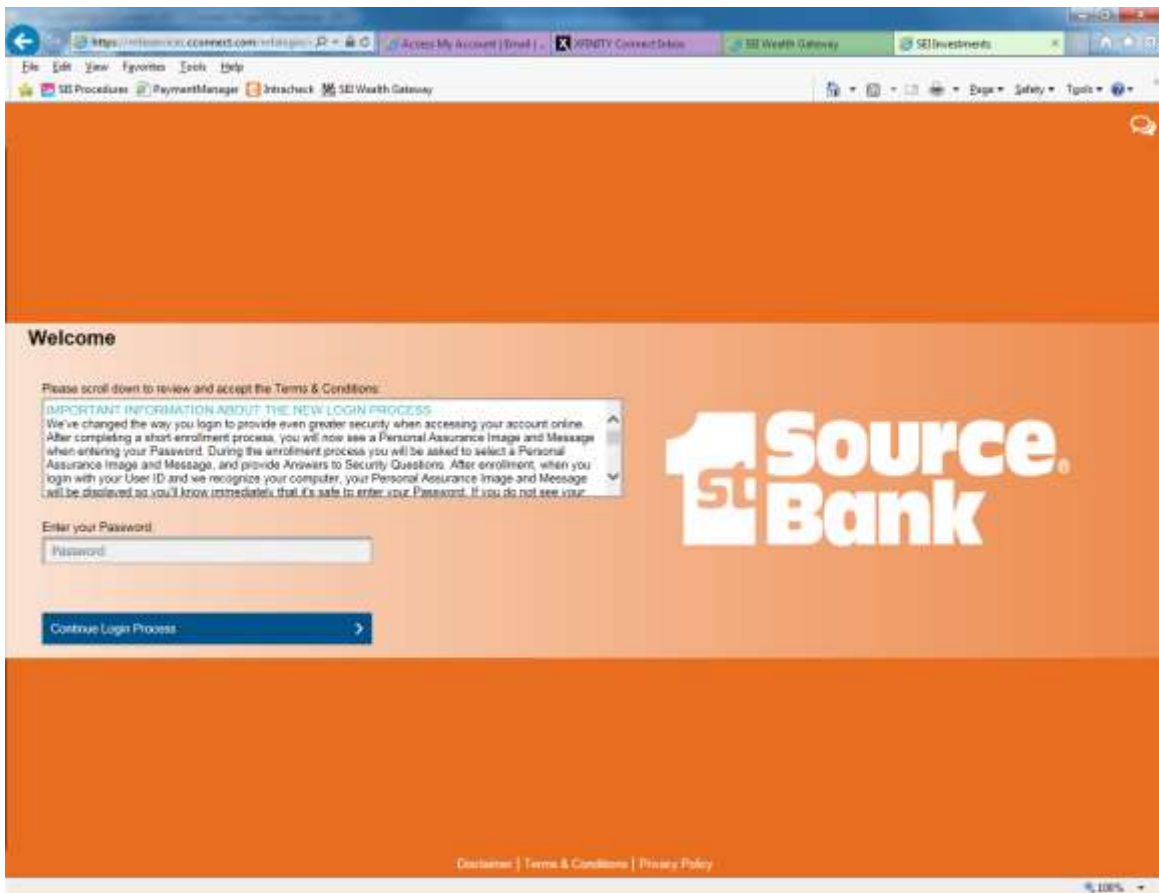
- Enter your User Identification Code provided by 1st Source Bank email in the appropriate box and click the “Continue Login Process” button.



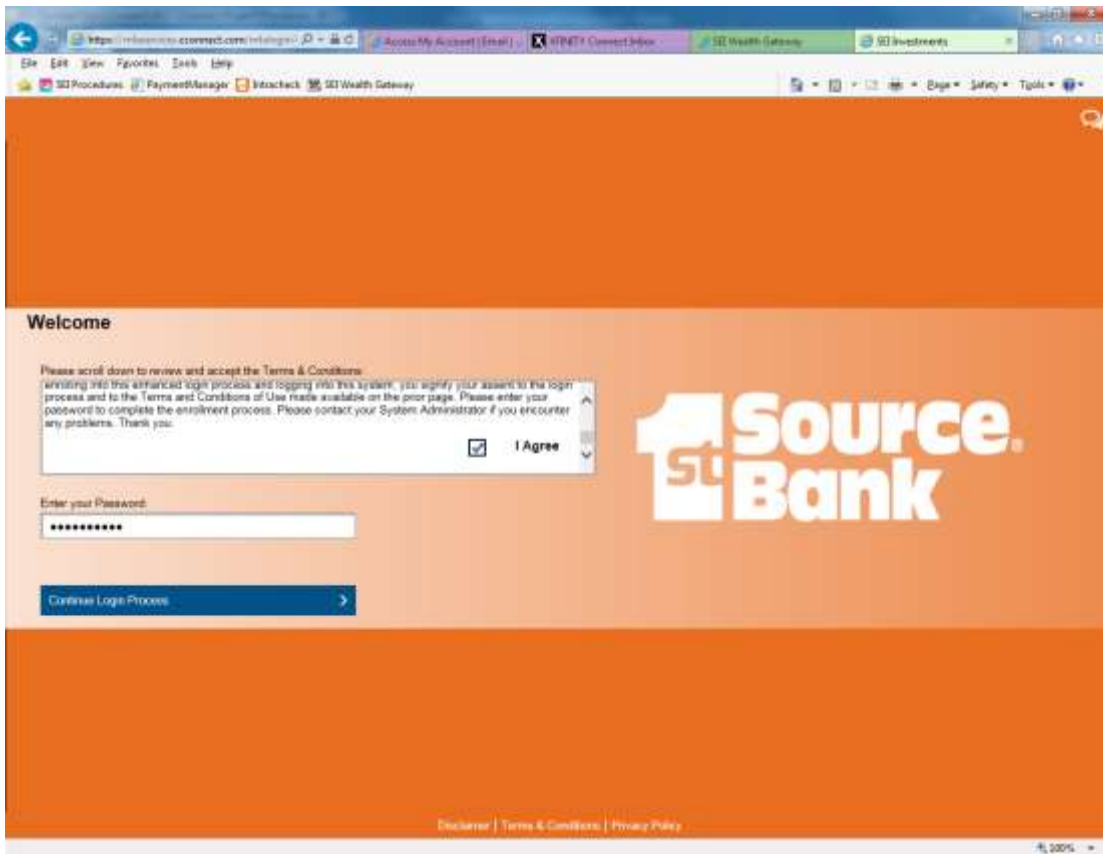
The screenshot shows the login interface for 1st Source Bank's Wealth Advisory Online. The page has an orange header and footer. The main content area is white. On the left, under the heading "Welcome", there is a form with the label "Enter your User ID:" and a text input field containing "TestCust01". Below the input field is a blue button labeled "Continue Login Process" with a right-pointing arrow. To the right of the form is the 1st Source Bank logo, which consists of a stylized house icon with "1st" inside, followed by the words "Source Bank" in a bold, sans-serif font. Below the logo, there is a paragraph of text: "For help logging on to Wealth Advisory Online, for technical questions, or for help with your account, please call 1st Source at 574-235-2914 or 1-800-862-6935 during our office hours. Our office hours are Monday – Friday 8:00 A.M. to 5:00 P.M." Below this text are two links: "Security Notice" and "Privacy Policy". At the bottom of the page, there is a small line of text: "Disclaimer | Terms & Conditions | Privacy Policy".

- You can enter your User Identification Code in either upper or lower case. **User Identification Code is not case sensitive.**
- **Note:** Special characters are not allowed in User Identification Code.
- Click “Continue Login Process”

- Review the Terms and Conditions in the box under Welcome



- Using the scroll bar, scroll to the bottom of the Terms and Conditions box. At the end, check the “I Agree” box to accept the Terms & Conditions.
- Enter the **case sensitive** temporary password provided by 1st Source Bank in email.
- Click “Continue Login Process”



- A One Time Password will be sent to your registered email address.
- Go to your email in-box to find the 8 digit One Time Password.
- The One Time Password will expire in 20 minutes.
- Enter the 8 digit One Time Password here.
- Click “Continue Login Process”



Note: If you click “Send me a new One Time Password”, you will receive another One Time Password. Make sure you **use the most current One Time Password in your email in-box.**

Step 2:

- Select five Security Questions and provide associated Answers to each.
- No two Security Questions may be the same.
- Answers to Security Questions must be between 2 and 20 characters.
- No special characters may be used.
- No two Answers to Security Questions may be the same.
- Click “Continue Login Process”



The screenshot shows a user interface with an orange header and footer. The main content area has a light orange background. At the top left, it says "Welcome TestCust01". Below that, there is a heading "Please select your Security Questions and Answers." followed by a small blue icon. The form consists of two columns: "Question" and "Answer". The "Question" column has five dropdown menus, each with "Select" as the current option. The "Answer" column has five text input fields, each with "Answer" as the placeholder text. A blue button with the text "Continue Login Process" and a right-pointing arrow is located below the form. At the bottom of the page, there are links for "Disclaimer", "Terms & Conditions", and "Privacy Policy".

Welcome TestCust01

Please select your Security Questions and Answers. ⓘ

Question	Answer
Select	Answer
Select	Answer
Select	Answer
Select	Answer
Select	Answer

Continue Login Process >

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Step 3:

- Enter a unique Password known only to you.
- Re-enter this Password in the “Confirm Password” box.
- The following rules apply to Passwords:
 - Must be between 8 and 20 characters
 - Must contain at least one number; one upper-case character; and one lower-case character
 - May have no more than two repeating characters
 - Must not match any of the last five passwords
- Select “Continue Login Process”
- Check “Register this device” box to skip these Security Questions the next time you log in

Welcome TestCust01

Enter your Password:

Re-Enter your Password:

Register this device and skip these Security Questions the next time you log in.

[Continue Login Process](#)

Source 1st Bank

Save time: Click “Register this device and skip the Security Questions next time.”

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- The Default My Accounts Page will display

The screenshot displays the 'My Accounts' interface. At the top, the total balance for all accounts is \$5,203,974.53. Below this, a table lists individual accounts and their balances. To the right, a donut chart titled 'ASSET ALLOCATION - ALL ACCOUNTS' shows the distribution of assets: Cash (14.05%), Fixed Income (20.61%), and Equity (74.97%). Below the chart, there are sections for 'Recent Transactions' and 'Newsfeed'. The 'Recent Transactions' table lists several sales of units and a dividend payment. A 'Transaction History' link is provided at the bottom of the table.

Account	Balance
CUSTOMER JOHN MANAGED IRA	\$3,555,362.14
CUSTOMER JOHN REV TRUST AGENCY	\$2,207.66
CUSTOMER JOHN ROTH IRA	\$540,424.58
CUSTOMER JOHN REV TRUST AGENCY	122,993.75

Date	Account	Description	Amount	Partials
11/10/2017	CUSTOMER JOHN ROTH IRA	SOLD 224.1700 UNITS OF FEDERATED GOVT OBU PD-PRMAT \$1.00	\$24.17	PRINCIPAL
11/10/2017	CUSTOMER JOHN MANAGED IRA	SOLD 1,181,660 UNITS OF FEDERATED GOVT OBU PD-PRMAT \$1.00	\$1,181.66	PRINCIPAL
11/10/2017	CUSTOMER JOHN REV TRUST AGENCY	SOLD 480.7400 UNITS OF FEDERATED GOVT OBU PD-PRMAT \$1.00	\$480.74	PRINCIPAL
11/10/2017	CUSTOMER JOHN REV TRUST AGENCY	SOLD 115.6700 UNITS OF FEDERATED GOVT OBU PD-PRMAT \$1.00	\$115.67	PRINCIPAL
11/10/2017	CUSTOMER JOHN ROTH IRA	RECEIVED \$0.15 DIVIDEND ON JACOBS ENGINEERING GROUP INC	\$10.80	PRINCIPAL

- You will receive a system generated email indicating that the User ID has been registered for access from your selected computer.

The screenshot shows an email interface with a header bar containing 'Delete', 'Respond', 'Quick Steps', 'More', 'Tags', 'Filtering', and 'Zoom'. The email is from 'no-reply@1stSource.com' to 'Sherry Martinowski'. The subject is 'Registered Computer Access'. The body of the email reads:

Dear Client,

This message is confirmation that your User ID has been registered for access from your selected computer.

If you did not perform this action or you feel that you have received this message in error, please contact your System Administrator.

This is a system-generated message. Do not reply to this message.

Enrollment Complete: User Authentication for Unregistered Computer

- If you did not check “Register this device and skip these Security Questions” box, the next time you log in, the Personal Assurance Message and Image you selected at Enrollment will be displayed.
- If you do not recognize your Personal Assurance Image and/or Message, **DO NOT** enter your password. Instead, close your browser and attempt to access the website again.
- If the Personal Assurance Image and Message match what you selected at Enrollment, enter your unique password from Step 3 of the Security Profile Setup.



Navigating Wealth Advisory Online

For more information about Wealth Advisory Online and the options available, please review the Wealth Advisory Online User Guide. This guide can be accessed by clicking the following link:

[Wealth Advisory Online User Guide.](#)