

Wealthscape Investor

Access Your Fidelity (NFS) Account Online

Website

www.wealthscapeinvestor.com



Wealthscape InvestorSM 
National Financial Services LLC

★★★★★ 4.7 • 12.5K Ratings

Free

**Mobile App Available
iOS and Android**

A Step By Step Guide

Step 1: Visit the Wealthscape Investor Website

- Open your browser: Use a browser like Google Chrome, Safari, or Firefox.
- Go to the website: In the address bar, type www.wealthscapeinvestor.com and press Enter.

Step 2: Locate the Login Section

- Once the website loads, you will see a **Login** button or section on the homepage. If you do not have a User ID or Username, you should establish an account by selecting **Register New User**.
- Click the Login button to proceed to the sign-in page.

Step 3: Enter Your Login Information

- Username: Enter the username you created when you registered or the ten-digit User ID that was assigned to you.
- Password: Enter the password associated with your account.
 - If you've forgotten your password, don't worry! You can click the **Forgot Password?** link to reset it.
 - Ensure your caps lock isn't on, as passwords are case-sensitive.
- Once both your username and password are entered correctly, click the **Login** button.

Step 4: Set Up Two-Factor Authentication (if prompted)

- For added security, Wealthscape Investor may ask you to complete a two-factor authentication (2FA) step.

This may involve:

- Receiving a code via email or SMS.
 - Entering the code into the authentication box.
- After entering the code, click **Verify** to continue.

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Step 5: Access Your Account Dashboard

Once logged in, you'll be directed to your account dashboard, where you can:

- View your portfolio and account details.
- Review recent transactions.
- Access Account Documents such as Statements, Tax Documents, Trade Confirmations and more.
- Manage Document Delivery Settings.

The screenshot shows the Wealthscape Investor account dashboard for Clark. The top navigation bar includes Home, Menu, User Options, and Sign Out. The main content area is titled "Good afternoon, Clark" and displays a "2024 tax form status. Check now" notification. The dashboard is divided into several sections: "Balances" showing \$0.00, "Today's Market" with DJIA (+31.98), NASDAQ (-251.04), and S&P 500 (-32.82), and "Asset Allocation" with a donut chart. A "Messages" section also shows no messages. The left sidebar contains navigation options for Accounts, Markets & Research, Quote, Investment Accounts, Bookmarks, and Help Center.

Manage your Document Delivery Instructions

- Select Menu in the top-right corner
- Select 'Document Delivery Instructions'
- Pick and choose which documents you would like to receive via U.S. Mail or Electronic Delivery

The screenshot shows the "Document Delivery Instructions" settings page. The top navigation bar includes Home, Menu, User Options, and Sign Out. The "Menu" button is circled in red. The left sidebar contains a search bar and a list of service links, with "Document Delivery Instructions" circled in red. The main content area is titled "Document Delivery Instructions" and includes a description: "Rather than sending paper-based mail, we will send you an email alert when your financial documents are available to view online." Below this, there is a section for "Select and save each account separately" with a dropdown menu showing "Individual (I) - WRA-003480" as "Enrolled". The "Email Address" is listed as "jdavis@tudorfinancial.com". The "Document Delivery Instructions" section has a checkbox for "Set all documents to electronic delivery" and a list of document types with radio buttons for "Electronic Delivery" and "U.S. Mail". The document types and their selected options are: Confirms/Confirming Prospectuses (Electronic Delivery), Statements & Regulatory Inserts (Electronic Delivery), Eligible Customer Correspondence (Electronic Delivery), Shareholder Reports (including Prospectuses) & Other Documents (Electronic Delivery), and Tax Forms & Related Disclosures (Electronic Delivery). At the bottom, there is a "Close" button and a "Save This Account" button.

What to Do if You Have Trouble Logging In

- Forgot Username or Password?
 - Click the Forgot Username? or Forgot Password? link on the login page and follow the prompts.
- Unable to Access Your Account?
 - Make sure you're using the correct login credentials and that you're on the right website (www.wealthscapeinvestor.com).
- Make Sure You're Using a Browser on the Supported Browser List
 - As of March 2025, the following browsers and operating systems:

Browser	Operating System
Microsoft Edge® 133	MAC® OS 15 Sequoia® / Windows 11
Google Chrome™ 133	MAC® OS 15 Sequoia® / Windows 11
Mozilla Firefox® 135	MAC® OS 15 Sequoia® / Windows 11
Apple® Safari® 18	MAC® OS 15 Sequoia®/visionOS 2

Tips for a Smooth Experience

- **Enable Browser Autofill:** To save time, consider enabling your browser's autofill feature for your username and password.
- **Bookmark the Website:** For quick access, save the Wealthscape Investor website as a bookmark in your browser.
- **Use a Secure Network:** Always access your account from a secure network to protect your information.
- As Wealthscape Investor is a financial website, periodically clearing your cookies and cache may be required to ensure new data is requested from our servers for all sessions.

Need Help?

If you have further questions or need assistance with anything on Wealthscape Investor, contact your advisor.

