### Welcome to Clear1



### What can we help you with?

Click the topic to review from the below list.

First Time Login Instructions Existing user with new device Update your General Settings

### **First Time Login Instructions**

## 1 Are you an existing or new Clear1 user?

#### If you're an Existing User

Enter your username and password and follow the prompts below. If you have forgotten your username or password, click Forgot Username or Forgot Password to retrieve them. If you need additional assistance please contact your financial professional or our Help Desk at (800) 260-0621 Option 3.

#### If you're a New User

Please contact your financial professional to obtain your temporary username and password.

# 2 Login to Clear 1

At the Account Log In page, enter your username and password and select  $\underline{\text{Log}}$  In.

Account Log In	Need help logging in? Call 1-858-530-4400 x4486
User Name	
Password Forgot Username or Password	
Log in	
Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a regist and SEC Registered Investment Advisor. Products offered through CFS: are not NCUANCUSF or cherwise feder obligations of the credit union, and may involve investment risk including possible loss of principal. Investment CFS. Hypothetical CU has contracted with CFS to make non-deposit investment products and services available	tered broker-dealer (Member FINRA/SIPC) ally insured, are not guarantees or Representatives are registered through to credit union members.
Information appearing on Clear 1 has been prepared for informational purposes, and market prices shown shou market value, which may vary from actual liquidation value. This display of information has been prepared from representation is being made as to its accuracy or completeness, and in addition not all product providers provi certain securities may have been provided by another source, the cost basis information in Lorar 1 may not refle your trade confirmations. This information should not be relied upon for tax reporting purposes nor does it repl directly from Pershing and for product providers, as apolicable. We believe the sources to be reliable. Neveevet	Id only be used as a general guide to data believed to be reliable, but no de account data. Since the cost basis on ct accurate data or correspond to data on ace the statements you should receive he accuracy and comoleteness of the

**Note:** If you receive a Bad Username or password message, please call our Help Desk at (800) 260-0621 Option 3.

# 3 Email verification

Verify your email address to receive an activation code.

CUSO FINANCIAL Profiles	
	Verify Email
	We have updated our login process. For security purposes, enter your email address below so we can send you an account activation email. You will be asked to create a new username and password once your email is validated.
	abbytester@aol.com Venty Email
	Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FNIRA/SIPC) and SEC Registered investment Advisor. Products offered through CFS are not RCUA/NCUSF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS. Hypothetical CU has contracted with CFS to make non-deposit Investment products and services available to credit union members.
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## 4 Access your email

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File Message Hel	lp Mimecast Acrobat 🖓	Tell me what you want to do						
⊠lgnore ∭ — ⊗Junk ~ Delete Archive	Reply Reply Forward All	☑ Testing Stuff       → To Manager         ☑ Team Email       ✓ Done         ⑤ Reply & Delete       梦 Create New		Mark Categorize Follow Unread Up v	ted ~ A) C Read ct ~ Aloud	Send to OneNote		
Delete	Respond	Quick Steps	F <sub>2</sub> Move	Tags F <sub>2</sub> Editing	Speech Zoom	OneNote		-
Pleas	e verify your Clear 1 emai	l address						
dv-help@cusc	onet.com(dv-help@cusonet.com v	ria sendorid net)			S Reply S	Reply All	-> Forward	
D To O Karla Tho	mpson						Thu 3/19/2020	3:37 PM
								- 1
Р	lease do not reply to this automation	cally generated email.						
Email verification code: 7F9nmC								
If you did not request this link, please ignore this message. Someone else might have typed your email address by mistake.								
								_

Access your email account. Your verification code will be in an email sent from <u>uniomailer@atriawealth.com</u>. The subject line reads: Please verify your Clear1 email address. The verification code is listed in the body of the email. If you do not receive the email within 5 minutes, check your spam/junk folders.

# 5 Verification code copy

Copy the verification code from the email into the Clear1 verification code field.

CUSO FINANCIAL NEED:     Located at -     Located at -     Creat Union	Verify Email
	A verification email will arrive in the next five minutes. Click the link in the email or enter the code below. If an email doesn't arrive, click here to try again. Verification code Conferen
	Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through CES: are not NCUA/NCUSIF or otherwise federally investment are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS. Hypothetical CU has contracted with CFS to make non-deposit investment products and services available to credit union members. Information appearing on Clear 1 has been prepared for informational purposes, and market prices shown should only be used as a general guide to market value, which may vary from actual liquidoin value. This display of information has been prepared from data believed to be reliable, but no representation is being made as to its accuracy or completeness, and in addition not all product providers provide accurate data. Since the cost basis on certain securities may have been provided by pointed suce, the cost basis information in Clear I may not reflect accurate data or correspond to data on your trade confirmations. This information should not be reliable, but no trade is replace the attenents you should one by every directly from Develors and for completeness, and not have to be reliable. The source that attenents you should one by directly from Develors and for completeness. A molicibility by Maleiro the pointing purposes for does it replace the attenents you should receive directly from Develors and for completeness.

# 6 Verify your mobile number

On the following screen, please enter your mobile number so we can send you a verification code via text message. Click the <u>Verify Mobile</u> button when done. Optionally, click Skip if you do not wish the site to use your mobile number for verifications.

- Located at -  COCOUNT CARDING CONTACT CARDING CONTACT CARDING CONTACT CARDING CARDI	Verify Mobile Number
	We have updated our login process. For security purposes, enter your mobile number below so we can send you an verification OTP on mobile.  1 - 858-567-5309  Verify Mobile  Skip
	Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through CFS: are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS. Hypothetical CU has contracted with CFS to make non-deposit Investment products and services available to credit union member Information appearing on Clear 1 has been prepared for informational purposes, and market prices shown should only be used as a general guide to market value, which may vary from actual liquidation value. This display of information has been prepared from data believed to be reliable, but no representation is being made as to its accuracy or completeness, and in addition not all product provides provide account data. Since the cost basis on

# 7 Enter the verification code

On the next screen, enter the verification code you received via text message on your mobile phone, then click <u>Continue.</u>

Located at -     Located at -     Control of the Control of t	Verify Mobile Number
	A verification OTP will arrive in the next five minutes. If an OTP doesn't arrive, click here to try again. Verification code Continue Step
	Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through CFS: are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS. Hypothetical CU has contracted with CFS to make non-deposit investment products and services available to credit union member Information appearing on Clear 1 has been prepared for informational purposes, and market prices shown should only be used as a general guide to market value, which may vary from actual liquidation value. This display of information has been prepared from data believed to be reliable, but no

# 8 Create a password

Enter a new password. For your reference, the password requirements display on this page.

ĸ
Enter a new password to use when logging in.
New password
Continue
Password requirements: All passwords must comply with the following requirements. You will not be able to change or reset a password if it does not meet these requirements
<ul> <li>Passwords must be 8 characters minimum</li> <li>At least one character</li> <li>At least one digit (0-9) is required</li> <li>Must not include space(s)</li> </ul>
- Password is case sensitive

# 9 Create a username

You will use the newly created username going forward to access your investment accounts in Clear1.

CUSO FINANCIAL Integrate - Located at	
HCU HYPOTHETICAL CREDIT UNION	Create a Username
	Enter a new username to use when logging in.
	New usemane
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# Success!





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### Existing user with new device

# 1 Are you an existing user returning to Clear1?

If you're an Existing User

Your current device may need verification. As an additional verification step to keep your account secure, you are required to verify your email address.

LANG CAPACITY AND A CONTRACT AND A CONTRACTACT AND A CONTRACT AND	Verify Email
	We have updated our login process. For security purposes, enter your email address below so we can send you an account activation email. You will be asked to create a new username and password once your email is validated.         abbytester@aol.com         Vority Email
	Non-deposit investment products and services are offered through CUSO Financial Services, L.P. (*CFS*), a registered broker-dealer (Member FINIA/SIRC) and SEC Begistered Investment Advisor. Products offered through CLSO Financial Services, L.P. (*CFS*), a registered through constraints or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS, Hypothetical CU has contracted with CFS to make non-deposit investment products and services available to credit union members. Information appearing on Clear 1 has been prepared for informational purposes, and market prices shown should only be used as general guide to market value, which may vary from actual liquidation value. This display of information has been prepared from data. Since the cost basis on certain securities may have been provided by another source, the cost basis information in Cera 1 may not reflect accurate data or correspond to data on your trade confirmations. This information hand not be relief up on for tax reporting purposes not does it replace the saccurate data or correspond to data on etterity from Pesthing and/or product providers, as applicable. We believe the sources to be reliable, however the accuracy and completeness of the directly from Pesthing and/or product providers, as applicable. We believe the sources to be reliable, however the accuracy and completeness of the



#### Email

Access your email account. Your verification code will be in an email sent from <u>dv-help@cusonet.com</u>. The subject line reads: Please verify your Clear1 device. The verification code is listed in the body of the email. If you do not receive the email within 5 minutes, check your spam/junk folders.

Please verify your Clear 1 device					
From: <dv-help@cusonet.com> To: <low@modog.com></low@modog.com></dv-help@cusonet.com>					
Show Info					
	Diagon de patrophyte this automatically generated ameil				
	Please do not reply to this automatically generated email.				
	Email verification code: 235618				

Copy the verification code from the email into the Clear1 One-time code field.



# **3** After successfully verifying your device, you will log in to Clear1.

	CUSO FINANC	IAL Member PREASE	Welcome back	k, Abby.				
	- Located at -	IGAL ION	\$11,863.66 uso		ACCOUNT STATEMENT Statement Ending Feb on February 29, 2020 24 UI	D 2020		Richard Dahl YOUR CFS REPRESENTATIVE
	Clear 1 Abigail Jacks Settings   Logo	on ut		Overview	Positions	Activity	Documents 😃	
~~	DESCRIPTION	VALUE	TOTAL ASSETS					
	All Accounts (0)	<u>\$0</u>	3m 6m 1vr 3v	5vr				
0	CAROLYN WINDSOR (7)	\$11.8k						
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0	4Y5360187 Build Wealth	\$868						\$10,000
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If you would like to add the option to verify your device in the future via text message, you may add your mobile number to the Settings section once you are logged in.

See instructions on updating your General Settings

For questions, contact the Help Desk at (800) 260-0621 Option 3, or support@cusonet.com

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Update your General Settings

1 Update your password, email, or phone number

After login into Clear1, select the <u>Settings</u> link on the left menu bar.



# 2 Update your information.

In the Settings screen, you can update your username, password, email address, or mobile number.

General Settings	
USERNAME AND PASSWORD	
Change Username	Update Password
New username	Current password
New username	Current password
Current password	New password
Current password	New password
Change username	Confirm new password
	Update password
	Password requirements: All passwords must comply with the following requirements. You will not be able to change or reset a password if it does not meet these requirements - Passwords must be 8 characters minimum - At least one character - At least one character - At least one character - Must not include space(s) - Password is case sensitive
EMAIL ADORESS	
Change Email Address	
Enter your email address below and click Verify Email.	
New email address	
Verify Email	
Already have a code to enter?	
MOBILE NUMBER	
Change Mobile Number	
Enter your Mobile number below and click Verify Mobile Number.	
1 - Mobile Number	
Verify Mobile Number	
Already have a code to enter?	

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