

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

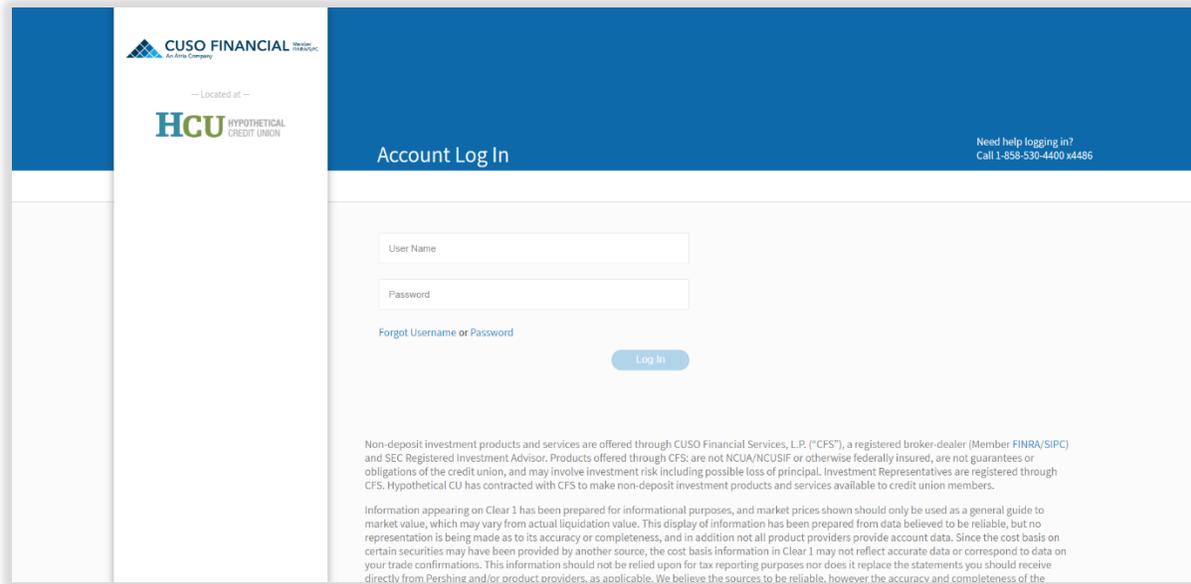
Enter your username and password and follow the prompts below. If you have forgotten your username or password, click [Forgot Username](#) or [Forgot Password](#) to retrieve them. If you need additional assistance please contact your financial professional or our Help Desk at (800) 260-0621 Option 3.

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 [Log In](#).

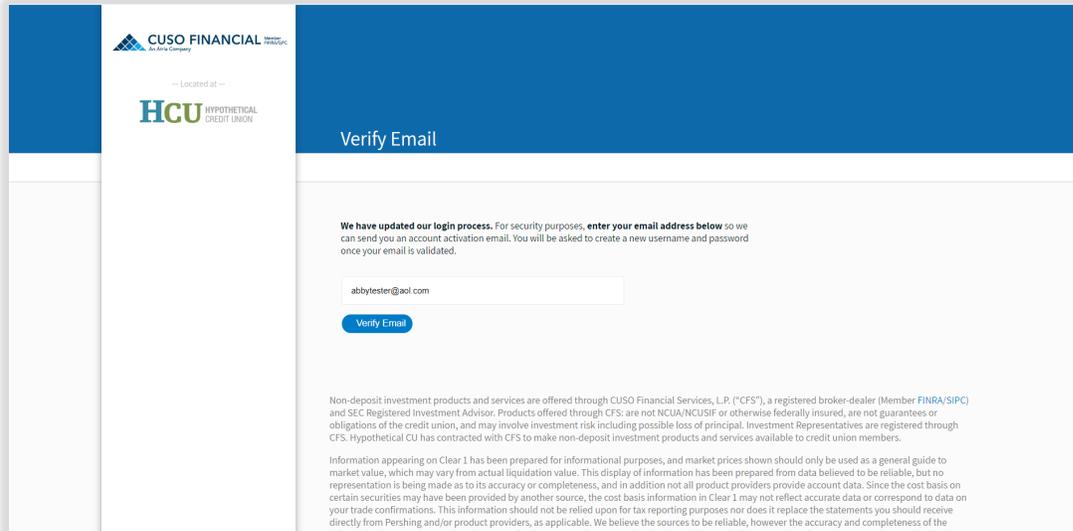


The screenshot shows the Account Log In page for HCU Hypothetical Credit Union. The page has a blue header with the CUSO FINANCIAL logo on the left and the text "Account Log In" and "Need help logging in? Call 1-858-530-4400 x4486" on the right. Below the header, there are two input fields for "User Name" and "Password". Below these fields is a link for "Forgot Username or Password" and a blue "Log In" button. At the bottom of the page, there is a disclaimer: "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 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 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 providers provide account data. Since the cost basis on certain securities may have been provided by another source, the cost basis information in Clear 1 may not reflect accurate data or correspond to data on your trade confirmations. This information should not be relied upon for tax reporting purposes nor does it replace the statements you should receive directly from Pershing and/or product providers, as applicable. We believe the sources to be reliable, however the accuracy and completeness of the

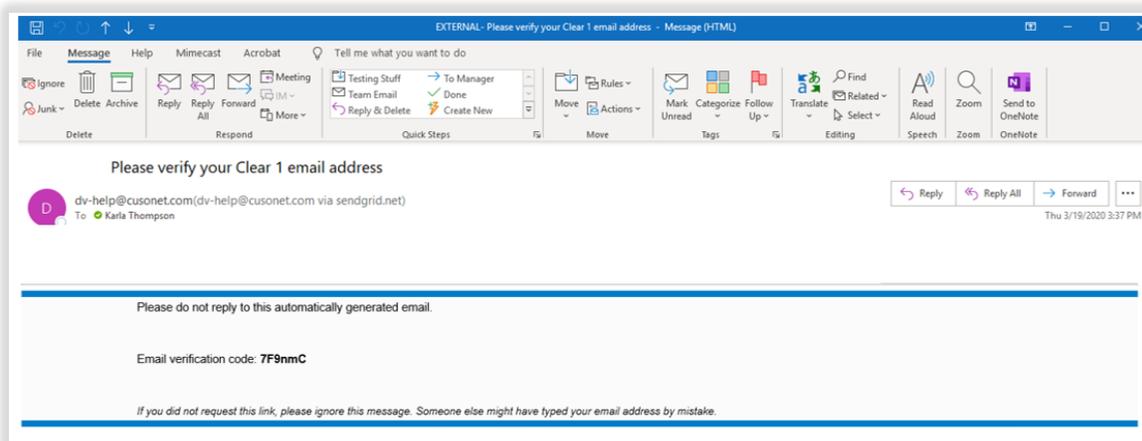
Note: If you receive a Bad Username or password message, please call our Help Desk at (800) 260-0621 Option 3.

3 Email verification

Verify your email address to receive an activation code.



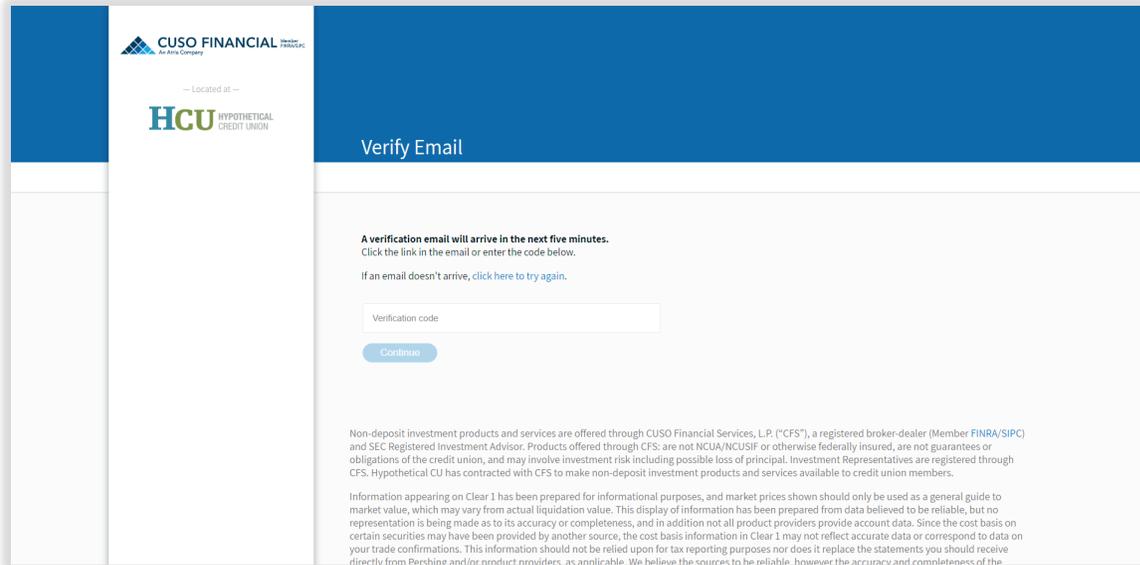
4 Access your email



Access your email account. Your verification code will be in an email sent from uniomailer@atriawealth.com. 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.

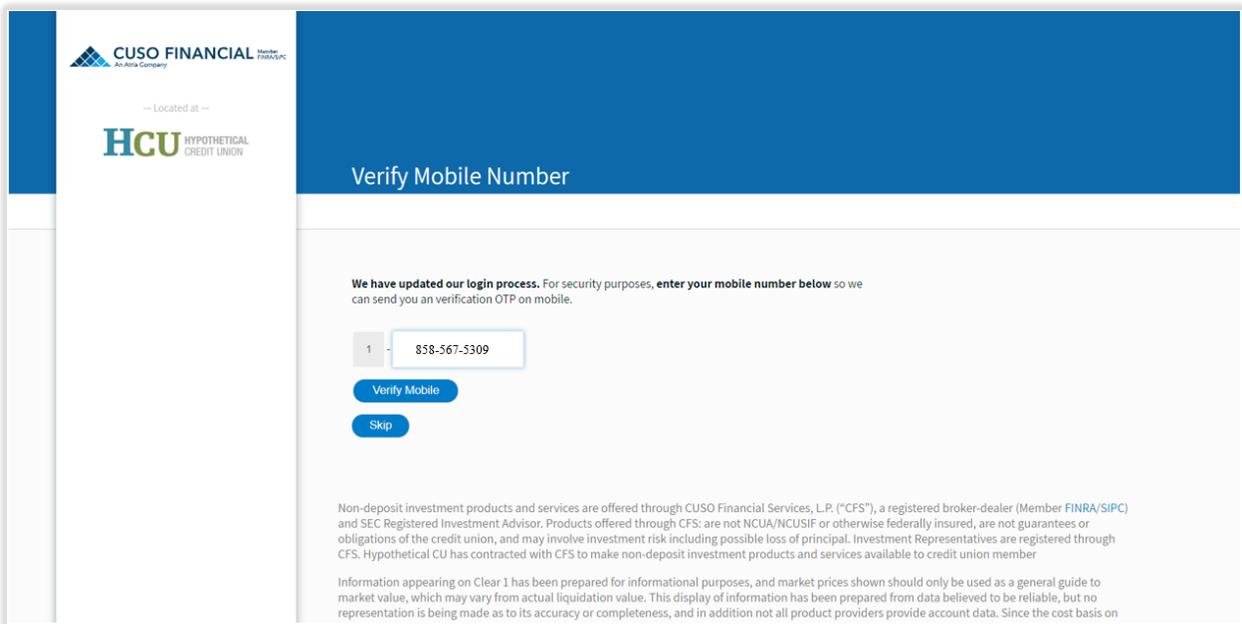
5 Verification code copy

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



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 Verify Mobile button when done. Optionally, click Skip if you do not wish the site to use your mobile number for verifications.



7 Enter the verification code

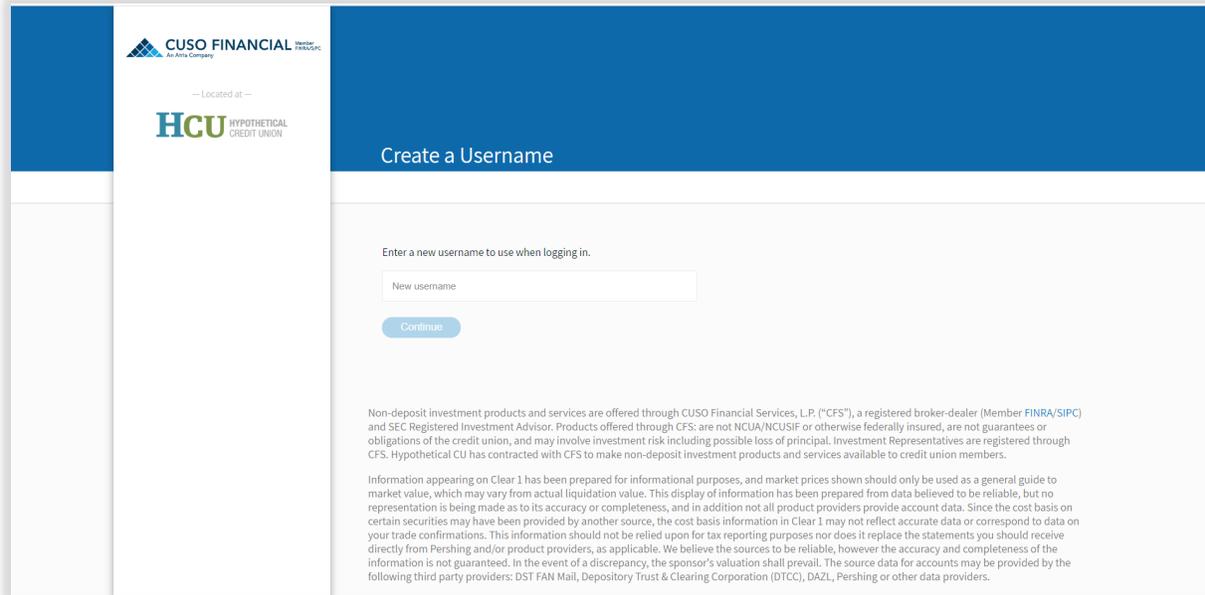
On the next screen, enter the verification code you received via text message on your mobile phone, then click Continue.

8 Create a password

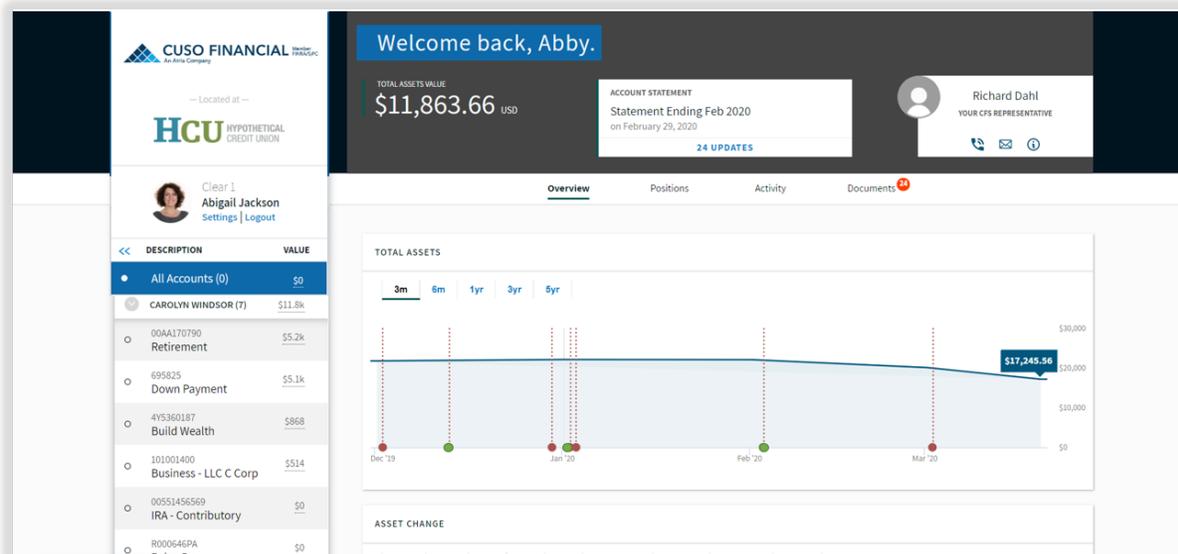
Enter a new password. For your reference, the password requirements display on this page.

9 Create a username

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



Success!



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



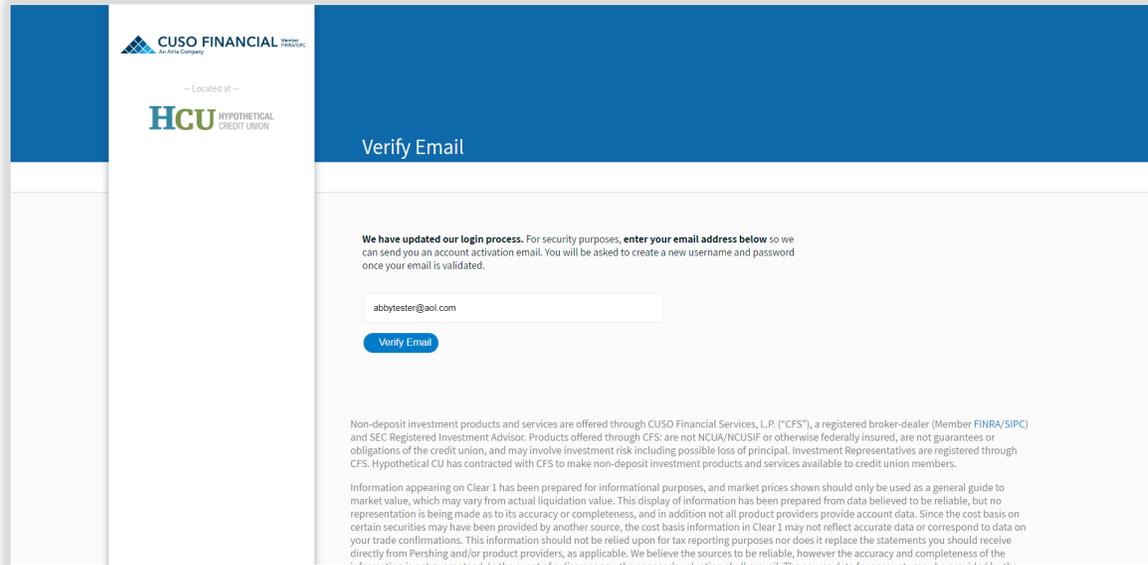
[Return to top](#)

Existing user with new device

1 Are you an existing user returning to Clear1?

If you're an Existing User

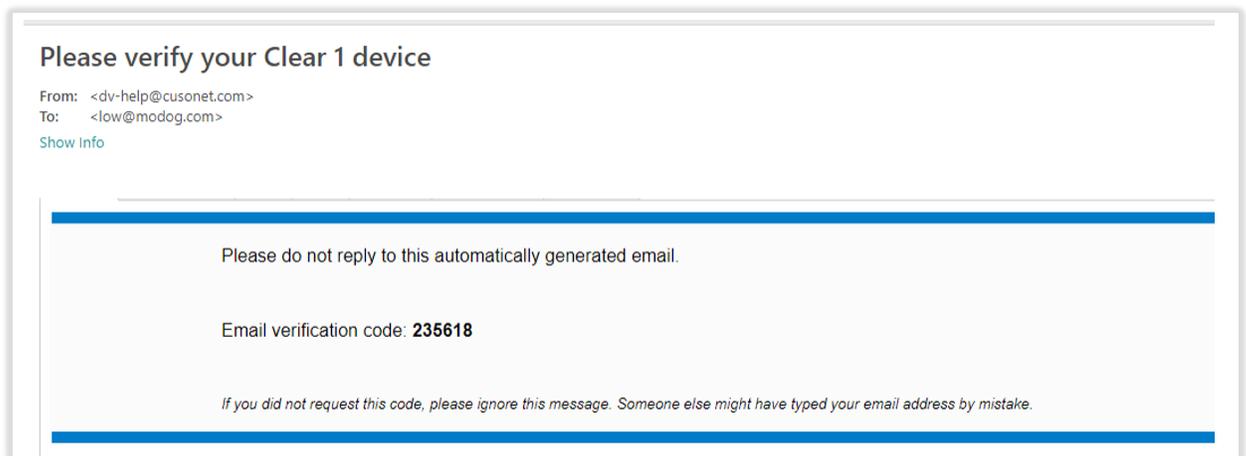
Your current device may need verification. As an additional verification step to keep your account secure, you are required to verify your email address.



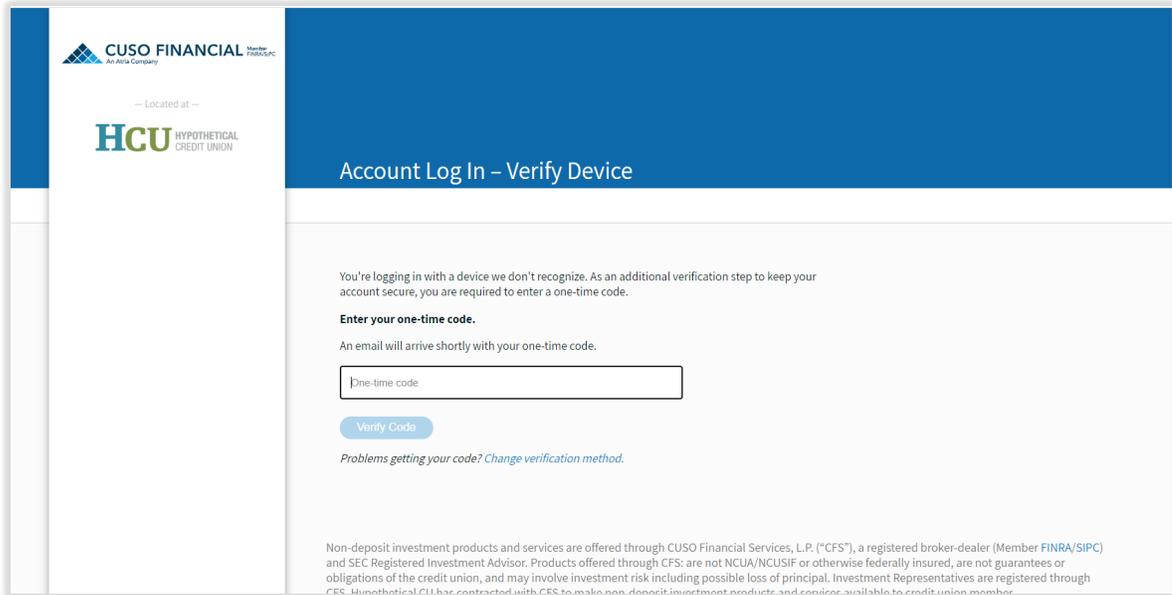
2 Verify your device

Email

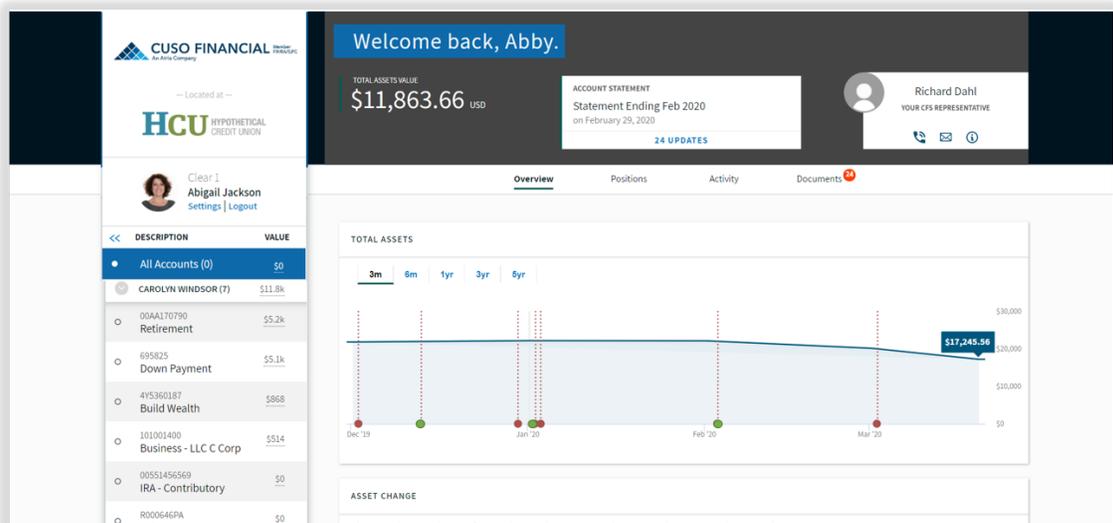
Access your email account. Your verification code will be in an email sent from dv-help@cusonet.com. The subject line reads: Please verify your Clear1 device. The verification code is listed in the body of the email. If you do not receive the email within 5 minutes, check your spam/junk folders.



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.



4 Verifying your device via Text Message



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](#)

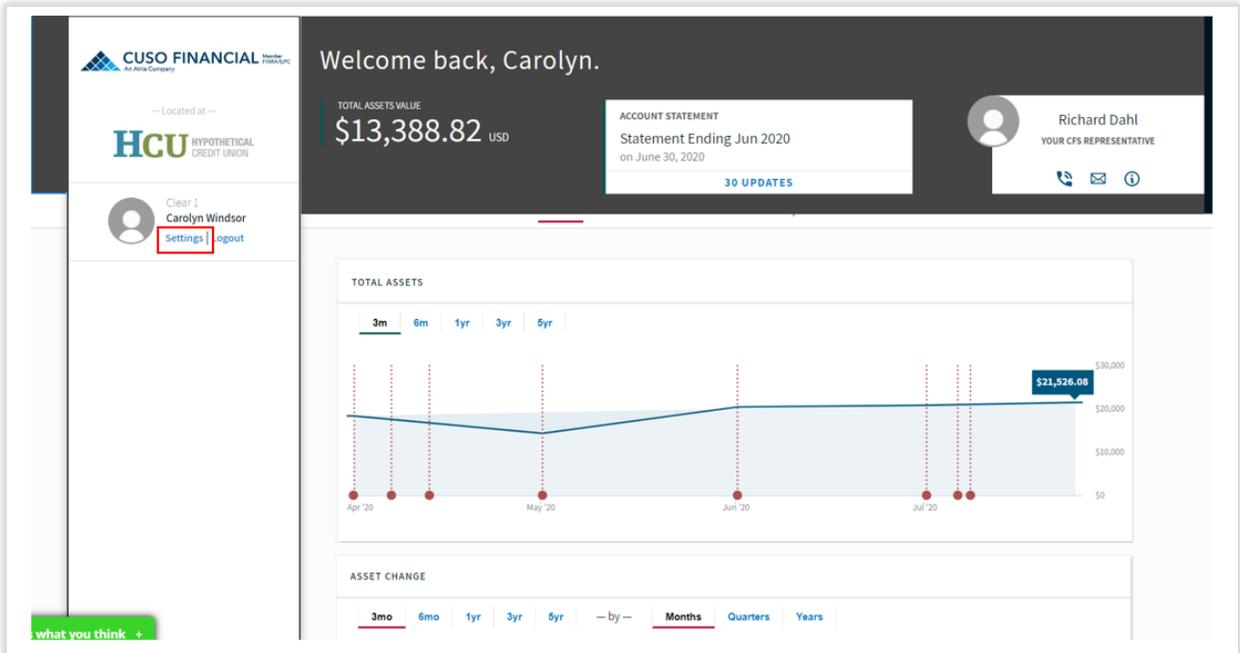
For questions, contact the Help Desk at (800) 260-0621 Option 3, or support@cusonet.com

[Return to top](#)

Update your General Settings

1 Update your password, email, or phone number

After login into Clear1, select the Settings 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

New username

Current password

[Change username](#)

Update Password

Current password

New password

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 digit (0-9) is required
- Must not include space(s)
- Password is case sensitive

EMAIL ADDRESS

Change Email Address

Enter your email address below and click **Verify Email**.

[Verify Email](#)

Already have a code to enter?

MOBILE NUMBER

Change Mobile Number

Enter your Mobile number below and click **Verify Mobile Number**.

 - Mobile Number

[Verify Mobile Number](#)

Already have a code to enter?

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

[Return to top](#)