
Connecting Your 401(k) and Other Held-Away Accounts



We are excited to help you manage your 401(k) and other held away accounts. We ask that you complete the following steps to ensure that our team can securely trade and manage your assets.

Step 1

Our team will send you a link to connect and authenticate your account. Please click the link to get started.

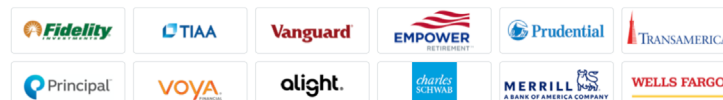
Step 2

Select the financial institution where your account is held. If it is not one of the options at the top of the page you can search for your financial institution in the search bar provided.

You can also copy the URL (web address) that you use to log in to your account and paste that in the search bar provided.



Select the financial institution that holds the account:



Or search for other financial institutions:

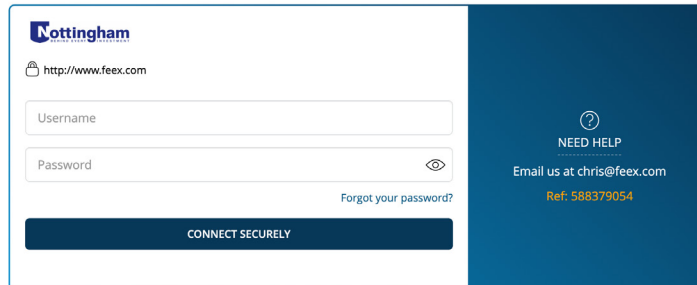
ⓘ If you're not sure what to select, please log into your financial institution account directly and copy and paste that web address (URL) into the search field above.

Step 3

Enter the login credentials for your financial institution. You may be prompted to complete additional security fields, such as two-factor authentication or account security questions.



Enter the login credentials that you normally use to log into your account directly.







Step 4

To ensure that your advisor can trade and manage your account without interruption, a unique forwarding phone number or secure email address may be added to your account. This phone number and email is generated for you alone. All communications from your financial institution that are sent to the email and/or phone number will be routed to you directly.

In some cases the technology will automatically update the contact information on your account. If the information cannot be added automatically, our team will reach out with instructions on how and where to make the change.

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 Held Away Order Management System 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 5

For employer-sponsored plans, select whether your current employer or a previous employer provides the plan.

We found the following account!

The following S. Nottingham Investments account has already been added.



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](#)

Connection Complete

Your account is now connected to the platform. If there are additional steps required to manage your account, we will contact you directly.