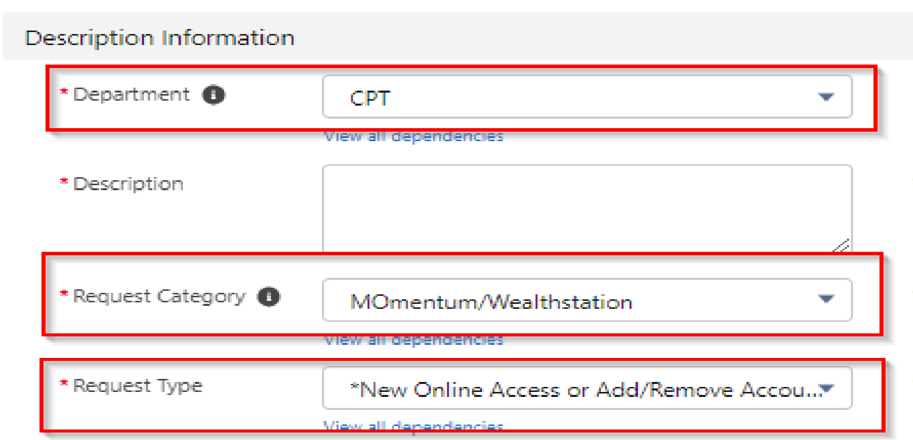
Investor Online Access

Self Registration

- MOmentum client self registration is avaiable for only the following account types:
    - Individual
    - Joint
    - Retirement Plan
    - Custodial
- Account types that are tied or set up under a SSN, will be eligible for self registration. That is the step one for eDelivery or paperless statement.
- **Account types that are tied to a TIN/EIN – trust, corporate, partnership, and or charitable organizations, will require the MOmentum Client Access Form for manual set up.**
- Once online access has been established, eDelivery will be available for udpate.
- Steps are attached for your convenience.

Manual set up

- Should one of your clients is technologically challenged and needs back office assistance, please complete the Momentum Client Access Form and submit it in a Service Center case to the CPT for processing. Workflow is shown below.


Description Information

* Department: CPT
View all dependencies

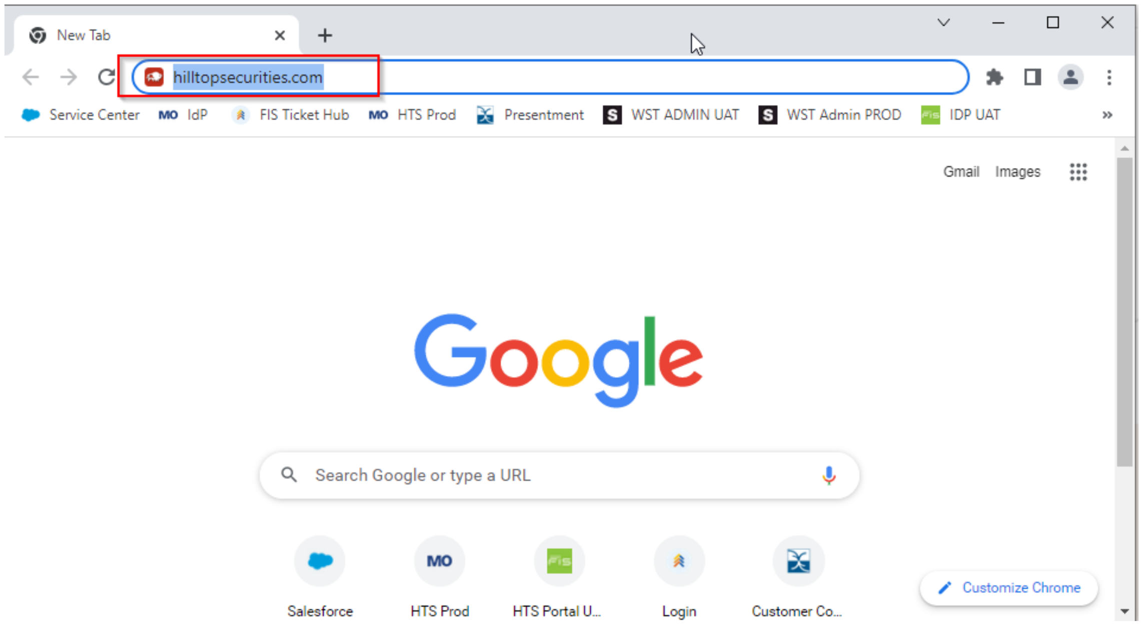
* Description:

* Request Category: MOmentum/Wealthstation
View all dependencies

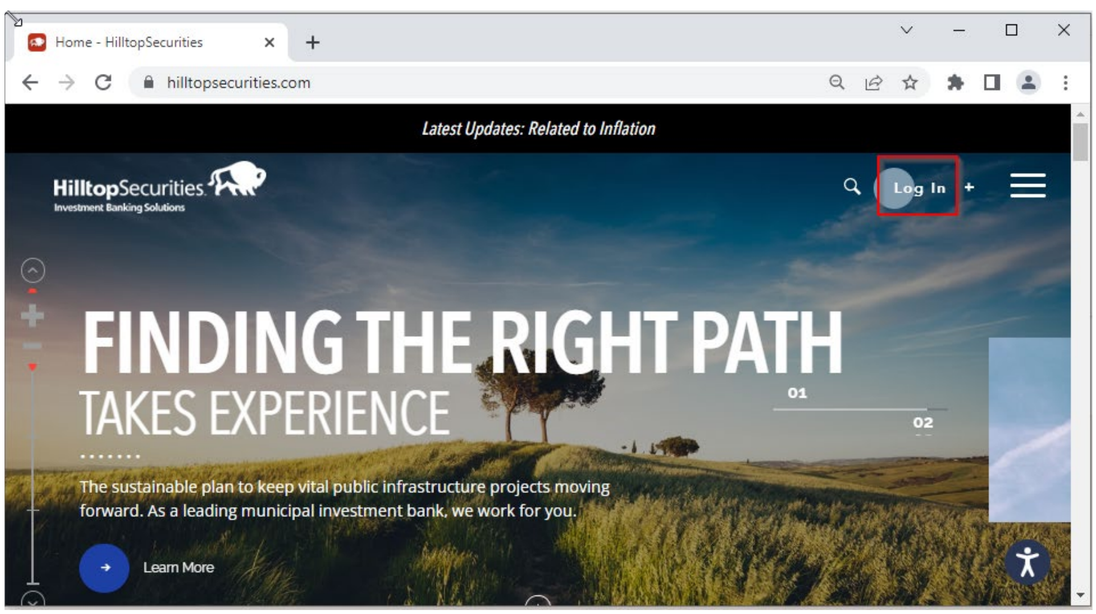
* Request Type: *New Online Access or Add/Remove Accou...
View all dependencies

Self Registration

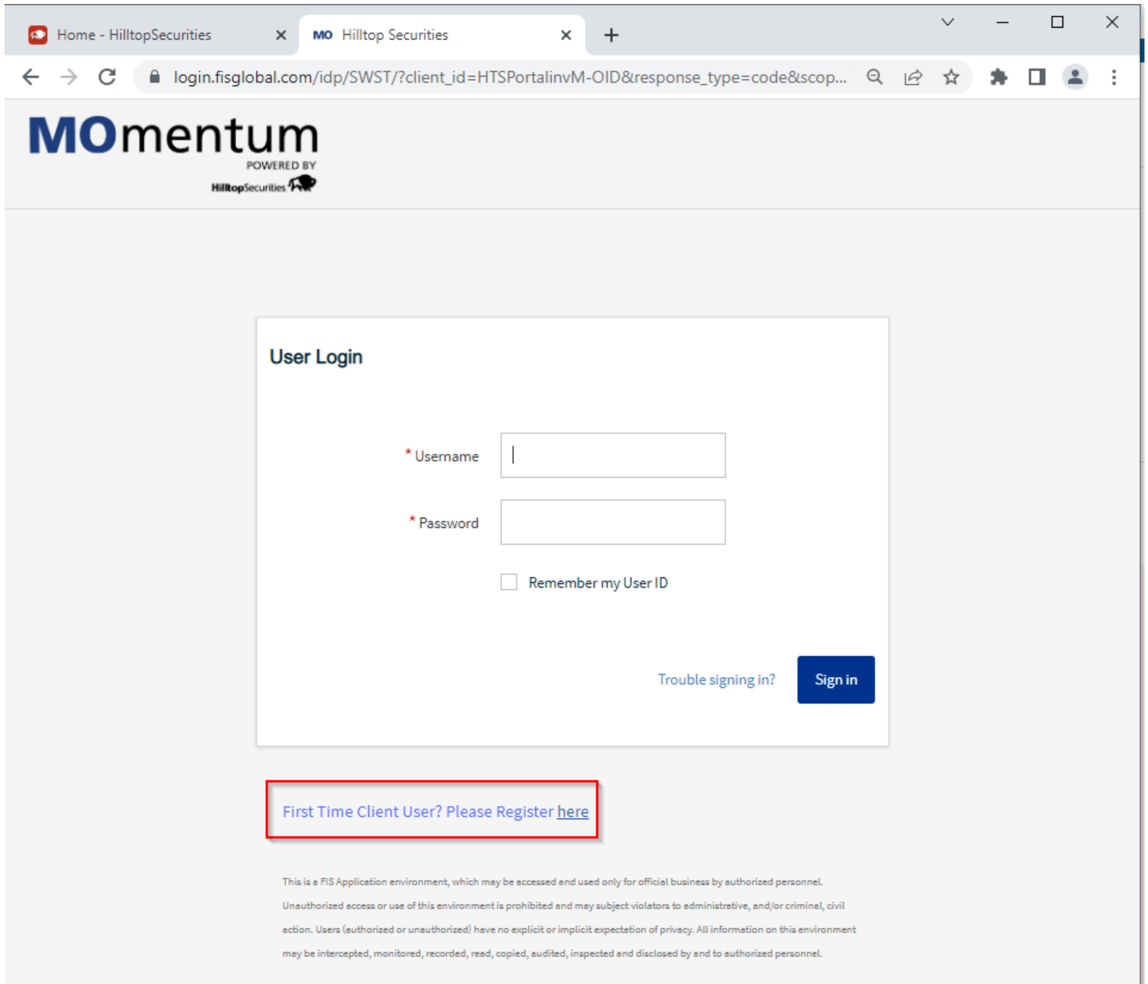
1. In a blank Google Chrome or Microsoft browser, type in hilltopsecurities.com in the address bar.



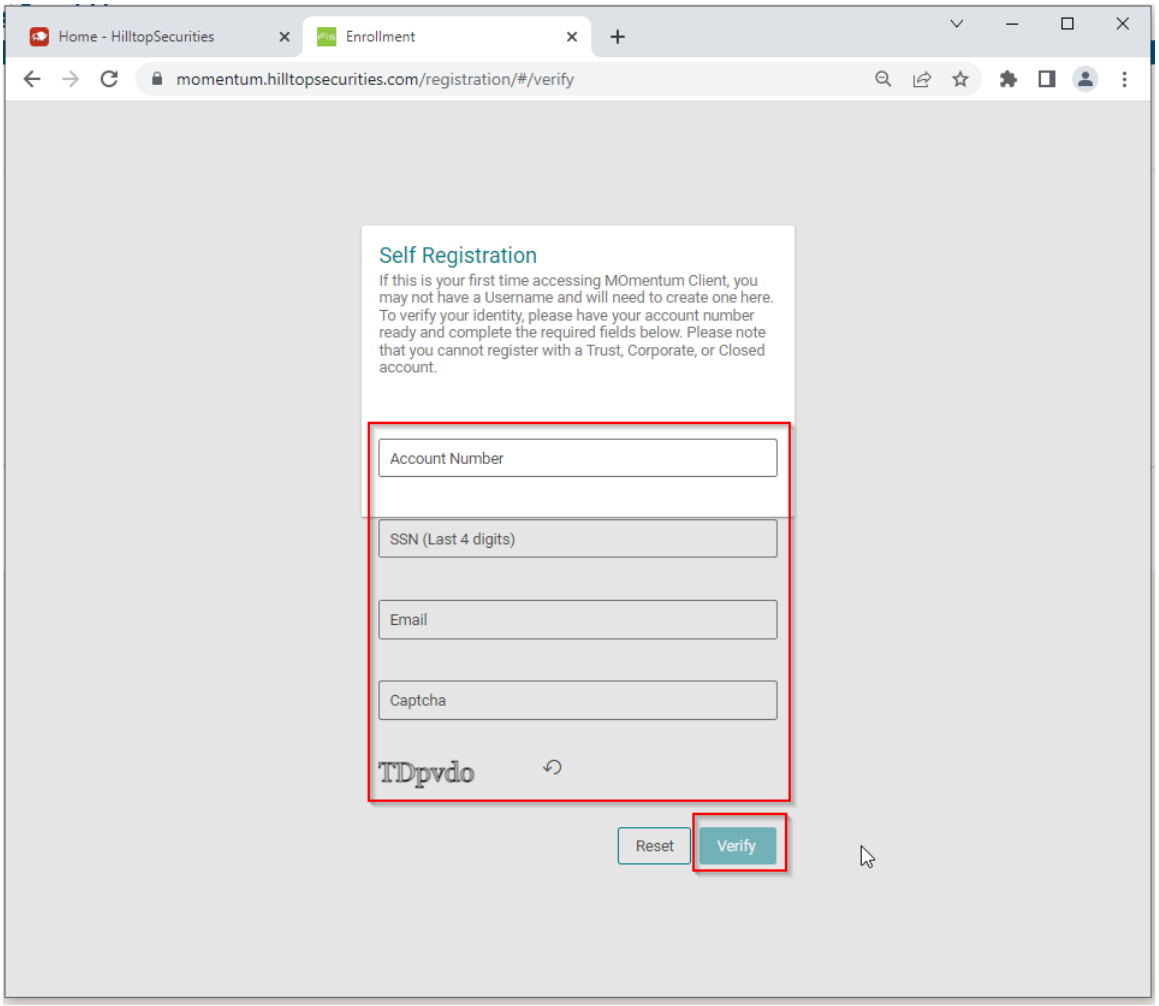
2. At the upper right hand corner of the screen, select Log In.



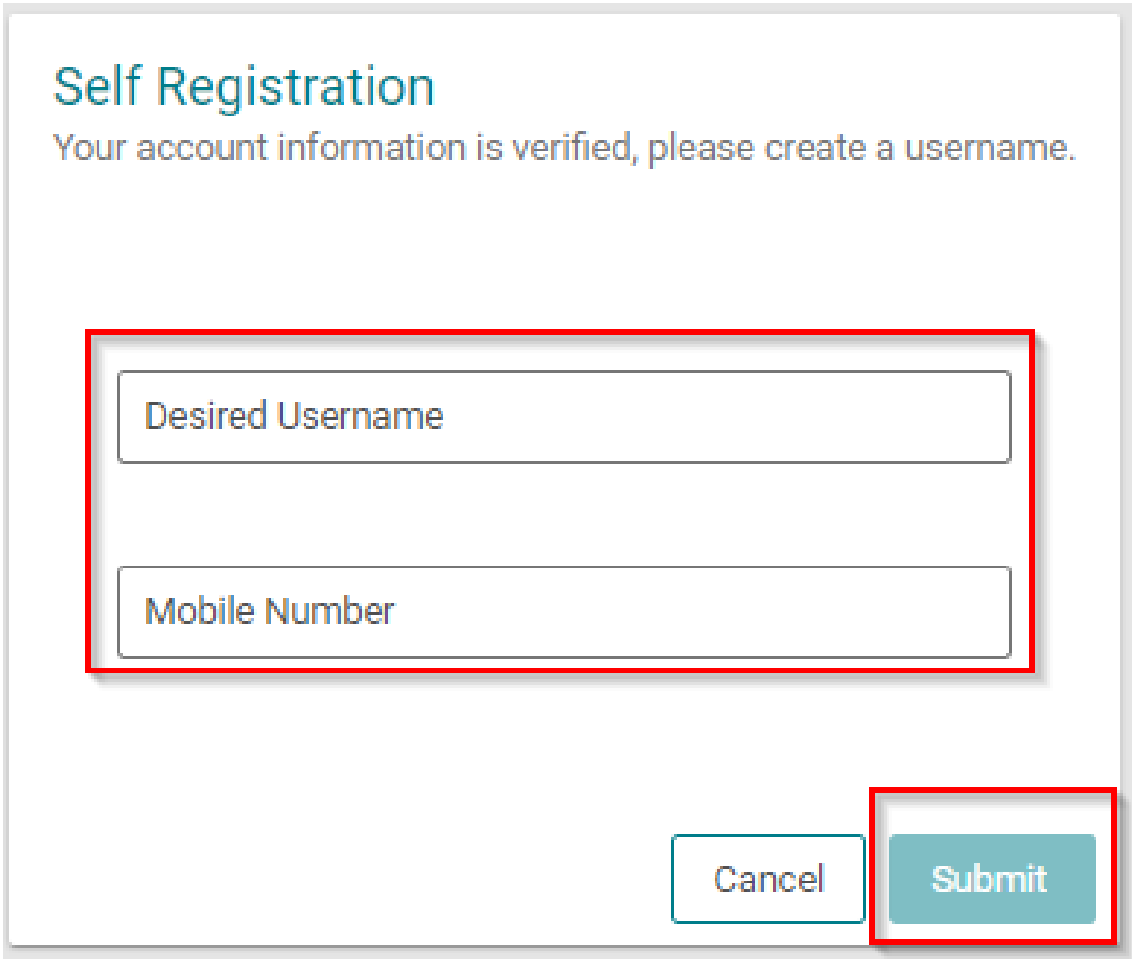
3. At the bottom of the login window, please select on the hyperlinked word “here,” for self registration.



4. Complete all four (4) required fields and select the “Verify” button.



5. Created a desired username, make sure it is not the email, but something that is easy for the investor to identify and remember. Enter a valid cell phone number and select the “Submit” button.

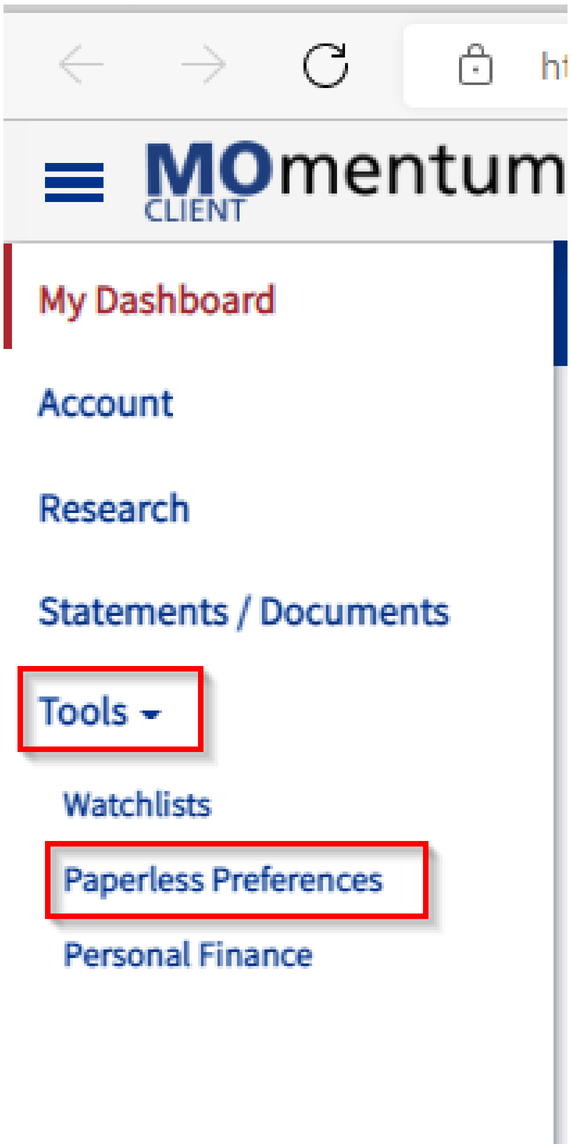


6. A successful message will appear and an email will be sent with the temporary password to login and reset.

eDelivery/Paperless Preferences

eDelivery enrollment has to be intiated by the investor. By logging into MOmentum Client site and locate the Tools option on the left hand side of the screen.

Note: investors has to have an online login in order to enroll in eDelivery.



Select the online user agreement and the next step will be the selection screen.

1. Please selec the box and the check mark will appear next to the account number.
2. Enter the email address that you would like to receive notification whenever a statement, letter, or trade confirmation is avaible for view or download.
3. Select the receving option.
4. Make sure you select the “Submit” button for update.

HTS/standalone/multipleconsentsearch.action