



# Managing Your Account with MSSB Online

## SUMMARY

MSSB Online delivers secure, convenient, online access to your Morgan Stanley Smith Barney account. It helps you stay informed so you and your Financial Advisor can work together to make decisions. Simply register for MSSB Online and you will be able to:

- View and manage your account any time
- Take advantage of the latest research and news, financial tools, and as applicable, online banking and trading
- Enroll in eDelivery to get your statements, tax forms, and other important account documents online
- Give family members and trusted professionals access to view your account

## MSSB ONLINE FEATURES

### VIEW AND MANAGE YOUR ACCOUNT ONLINE

- Easily navigate between your Account Summary, Activity, Holdings, Gain/Loss, and Documents
- Customize your Account Summary Home Page based on your priorities and interests
- Filter and sort to view the specific data, balances, and totals you need
- Get one-click access to holding details, quotes, trading, and checks (as applicable)
- View and download current and historical statements, trade confirmations, tax documents, general correspondence, reports, and agreements

**All Accounts**

| Account                                     | Cash, MMF and Deposits | Priced assets     | Today's Change in Value | Acct. value        |
|---|------------------------|-------------------|-------------------------|--------------------|
| Grandchildren account - 0271 MORGAN STANLEY | \$12,319.48            | \$2,490.36        | +60.39                  | \$14,809.84        |
| Children's account - 0270 MORGAN STANLEY    | \$3,995.64             | \$4,678.05        | +43.43                  | \$8,673.69         |
| <b>Total</b>                                | <b>\$16,315.12</b>     | <b>\$7,168.41</b> | <b>+111.82</b>          | <b>\$23,483.53</b> |

**Asset Summary**

| Cash, MMF and Deposits | Current value | Prev. close | Today's Change | % of assets |
|------------------------|---------------|-------------|----------------|-------------|
| Cash                   | -\$222.80     | -\$15.00    | -\$217.80      | -           |

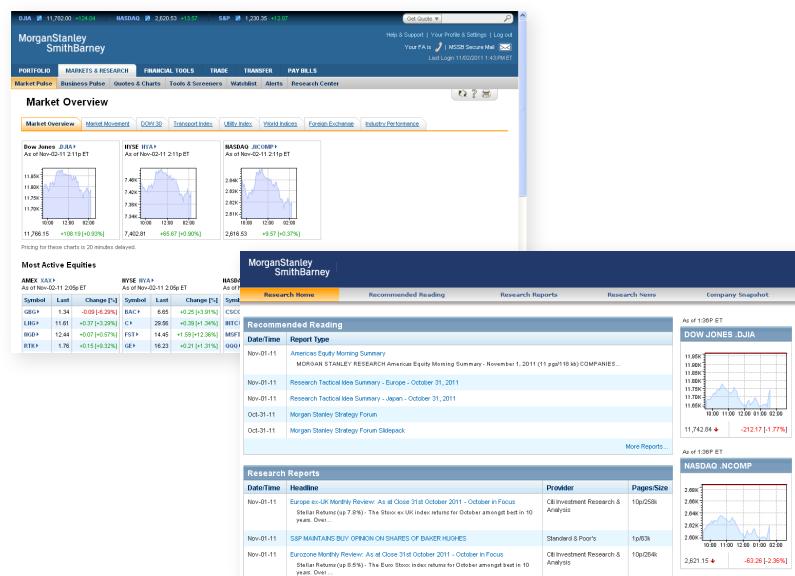
**Q:** Why don't I see my **Cash Balance** when I look at my Activity?  
**A:** Filter on **only a single account** to see your Cash Balance.

**VIEW MORE FAQS >**

## MSSB ONLINE FEATURES CONT.

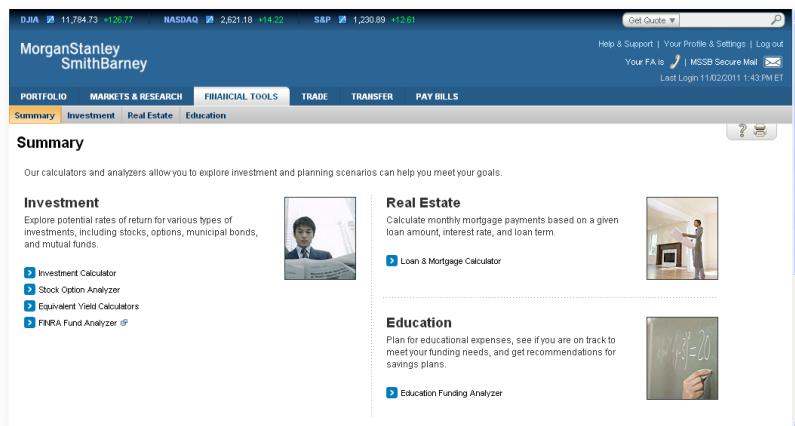
### STAY CURRENT WITH THE LATEST RESEARCH AND NEWS

- View and download research reports from Morgan Stanley, Citi Investment Research & Analysis, and Standard & Poor's
- Get quotes, charts, SEC filing documents, mutual fund prospectuses, and Investment reports
- Use Watchlist to track up to 250 securities you own or want to watch
- Create custom market data and news alerts delivered to your inbox, cell, or smartphone  
*Standard rates will apply.*
- Browse and search current market and business news and information, including a comprehensive selection of articles from Dow Jones News Service



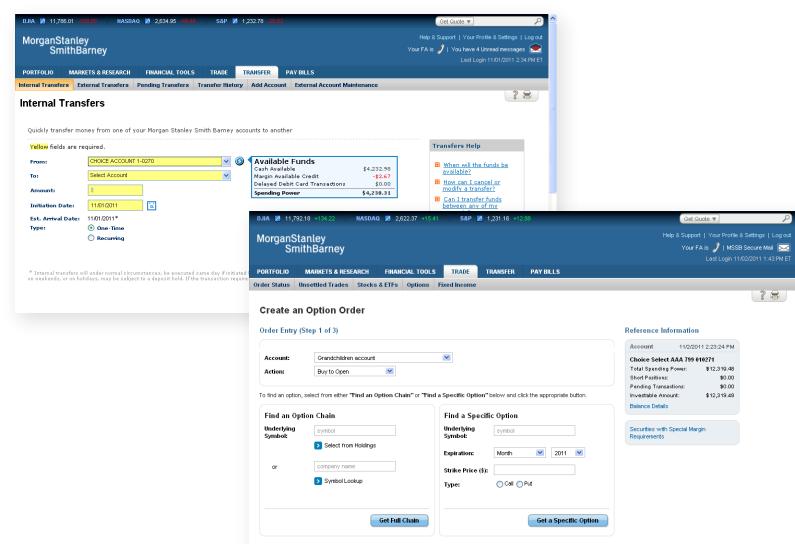
### USE FINANCIAL TOOLS TO EXPLORE SCENARIOS

- Use investment screeners to identify securities that meet your personal investment criteria
- Model investment scenarios, calculate monthly mortgage payments, and see if you are on track to meet your education funding goals



### TRADE SECURITIES, TRANSFER FUNDS, AND PAY BILLS ONLINE (FOR ELIGIBLE ACCOUNTS)

- Buy and sell securities, manage your orders, and collaborate with your Financial Advisor on your investment goals
- Transfer money online between your Morgan Stanley Smith Barney accounts and your accounts at other financial institutions
- Pay bills online, schedule future payments, and view pending payments and balance information



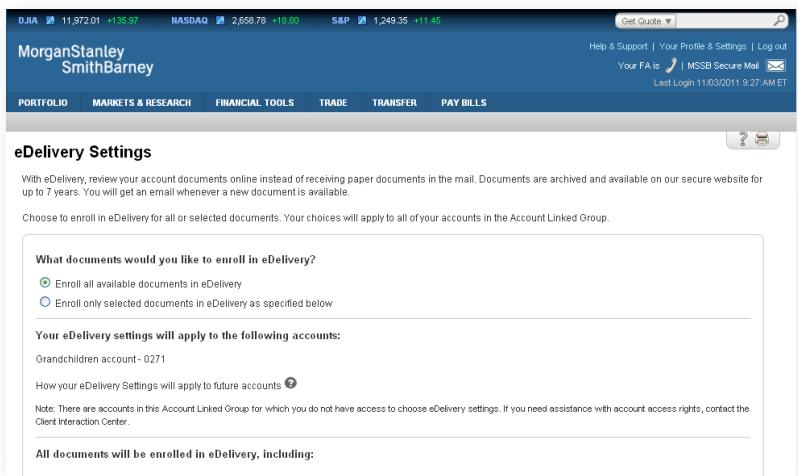
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## MSSB ONLINE FEATURES CONT.

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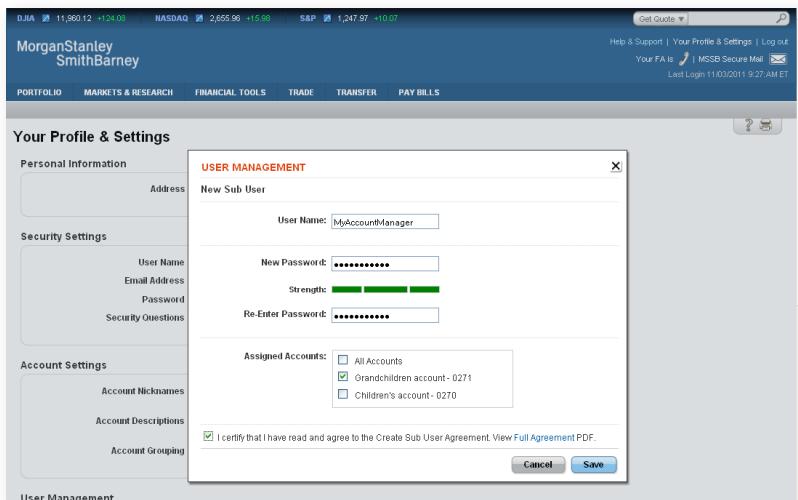
### GET EDELIVERY OF ACCOUNT DOCUMENTS INSTEAD OF PAPER DOCUMENTS BY MAIL

- Get your statements, tax forms, trade confirmations, and other important account documents online from one convenient place
- Reduce waste and clutter by no longer receiving paper documents by mail
- Get email notifications when new documents are available online



### GIVE FAMILY MEMBERS AND TRUSTED PROFESSIONALS ACCESS TO YOUR ACCOUNT

- Securely grant family members and trusted professionals access to view your account
- Access your accounts held at different branches with a single user name and password



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## HOW TO REGISTER

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### CURRENT CLIENTS

If you are already a Morgan Stanley Smith Barney client, go to [mssb.com](http://mssb.com) and click “Register online to access your account” in the login box on the left. Just have your account number handy.

### PROSPECTIVE CLIENTS

If you are not yet a Morgan Stanley Smith Barney client, learn more by talking to a Financial Advisor. Go to [mssb.com](http://mssb.com) and click “Find an Advisor/Branch” at the top of the page.

