



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

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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	+68.39	\$14,809.84
Children's account - 0270 MORGAN STANLEY	\$3,895.64	\$4,678.05	+43.43	\$8,673.69
Total	\$16,315.12	\$7,168.41	+111.82	\$23,483.53

Cash, MMF and Deposits	Current value	Prev. close	Today's Change	% of assets
Cash	\$222.80	\$5.00	-217.80	-

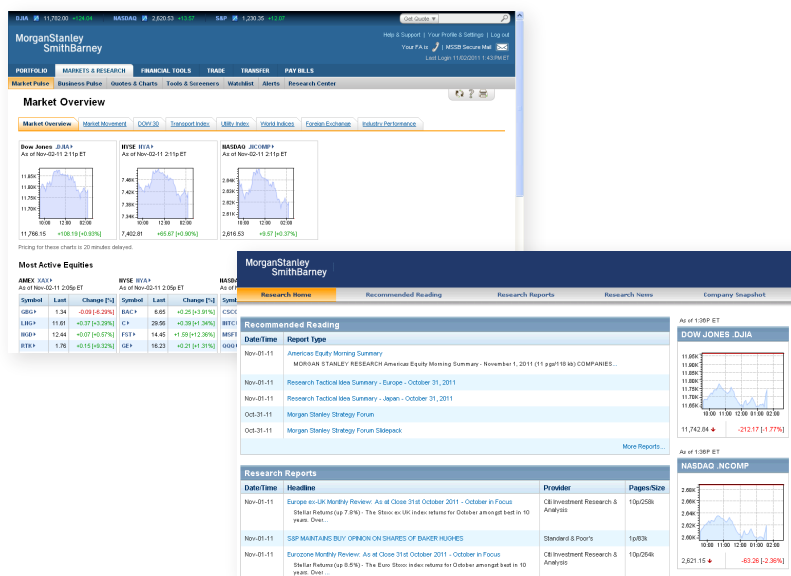
Q: Why don't I see my Cash Balance when I look at my Activity?

A: Filter on only a single account to see your Cash Balance.

[VIEW MORE FAQs >>](#)

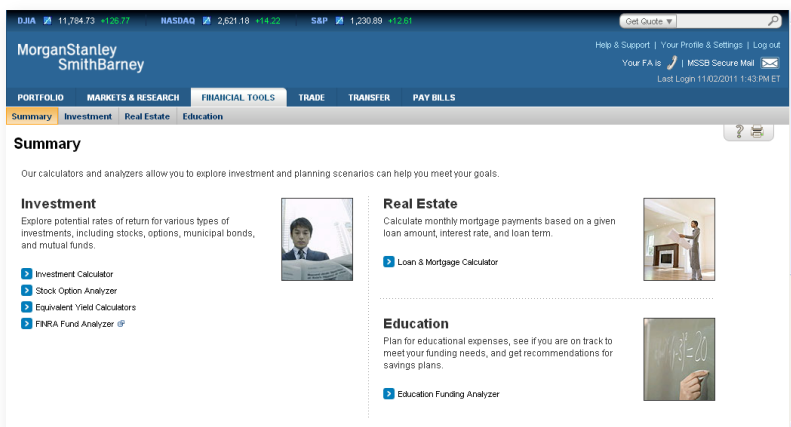
STAY CURRENT WITH THE LATEST RESEARCH AND NEWS

- 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



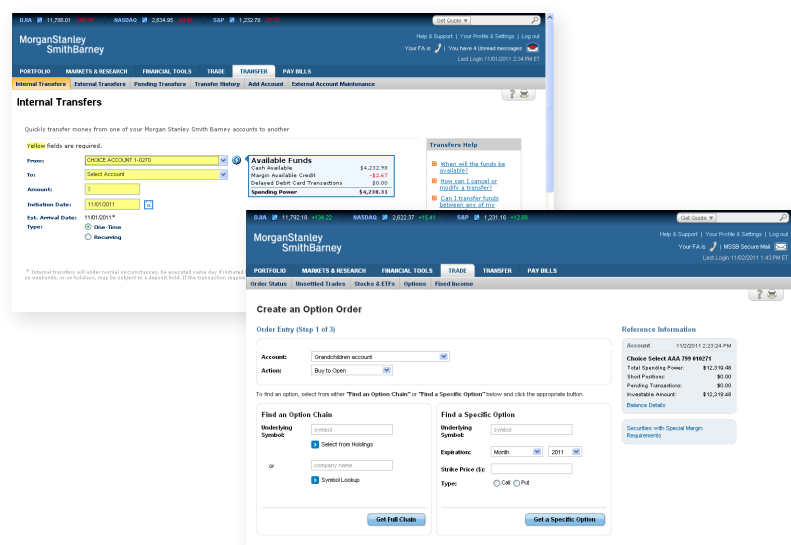
USE FINANCIAL TOOLS TO EXPLORE SCENARIOS

- 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



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

The screenshot shows the 'eDelivery Settings' page on the Morgan Stanley Smith Barney website. At the top, there's a navigation bar with links like PORTFOLIO, MARKETS & RESEARCH, FINANCIAL TOOLS, TRADE, TRANSFER, and PAY BILLS. The main heading is 'eDelivery Settings'. Below it, a paragraph explains that with eDelivery, users can review account documents online instead of receiving paper documents by mail. It states that documents are archived and available on the secure website for up to 7 years. A section titled 'What documents would you like to enroll in eDelivery?' has two radio button options: 'Enroll all available documents in eDelivery' (which is selected) and 'Enroll only selected documents in eDelivery as specified below'. Below this, it says 'Your eDelivery settings will apply to the following accounts:' and lists 'Grandchildren account - 0271'. There's also a section for 'How your eDelivery Settings will apply to future accounts' with a note about account access. At the bottom, it states 'All documents will be enrolled in eDelivery, including:'.

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

The screenshot shows the 'User Management' dialog box on the Morgan Stanley Smith Barney website. The dialog is titled 'New Sub User'. It has fields for 'User Name' (pre-filled with 'MyAccountManager'), 'New Password', 'Strength' (indicated by a green bar), and 'Re-Enter Password'. Below these fields is a section for 'Assigned Accounts' with checkboxes for 'All Accounts', 'Grandchildren account - 0271' (which is checked), and 'Children's account - 0270'. At the bottom, there's a checkbox for 'I certify that I have read and agree to the Create Sub User Agreement. View Full Agreement PDF.' and 'Cancel' and 'Save' buttons.

HOW TO REGISTER

CURRENT CLIENTS

If you are already a Morgan Stanley Smith Barney client, go to 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 and click “Find an Advisor/Branch” at the top of the page.

The screenshot shows the 'Online Registration' page on the Morgan Stanley Smith Barney website. The page is titled 'Online Registration' and has a sub-heading 'Identification (Step 1 of 3)'. It asks the user to identify themselves by providing the first 9 digits of their Account Number and the last 4 digits of their Social Security Number (SSN). It also provides a link to 'Register with a PassportID Number'. There are input fields for 'Account Number' (pre-filled with 'AAA-00000') and 'Last 4 Digits of SSN' (pre-filled with '1234'). At the bottom, there are 'Cancel' and 'Continue' buttons. On the right side, there's a 'Registration Help' section with links to 'Which account should I enter?', 'Why do I need to enter my Social Security Number?', and 'What if I already received a registration code?'.