



## Managing Your Wealth Manager Viewing Preferences

To manage your Wealth Manager viewing preferences, go to Preferences and select "Manage Preferences."

The screenshot shows the 'Your Preference Options' section of the website. The 'Manage Preferences' link is highlighted with a red box. Other options include 'Manage Working Lists', 'Manage Scrolling Ticker List', 'Manage Security Watchlist', 'Security Information', 'User/Password Management', and 'Agreement Information'.

Use the drop-down boxes to select your Wealth Manager preferences, including "Working List" defaults, your initial login page, trade date/settle date position viewing preference, and download format, among others. Once you have selected all of your preferences, select "Apply."

The screenshot shows the 'Display and Data Preferences' form. The 'Apply' button is highlighted with a red box. The form includes sections for General, Portfolio, and Activity preferences, with various drop-down menus and checkboxes.

