Pontera
formerly FeeX

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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.

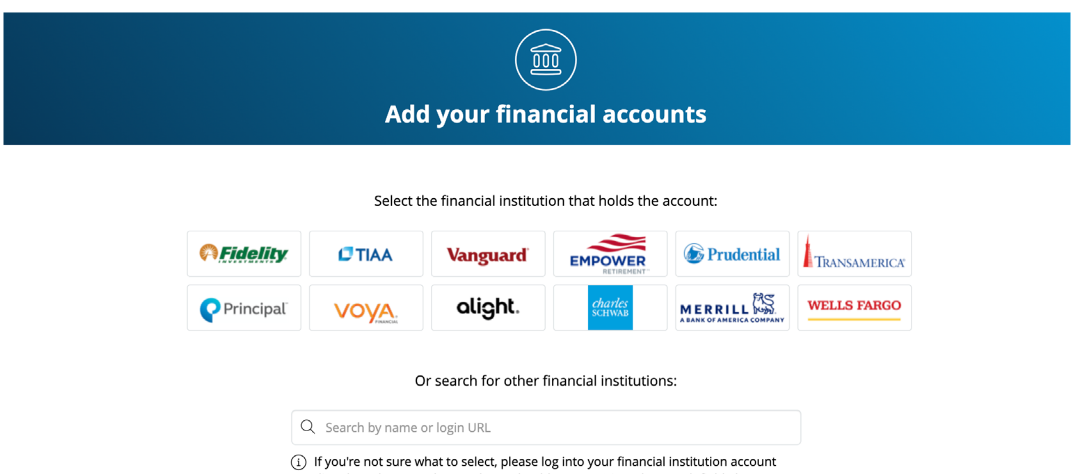
Step 1

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.



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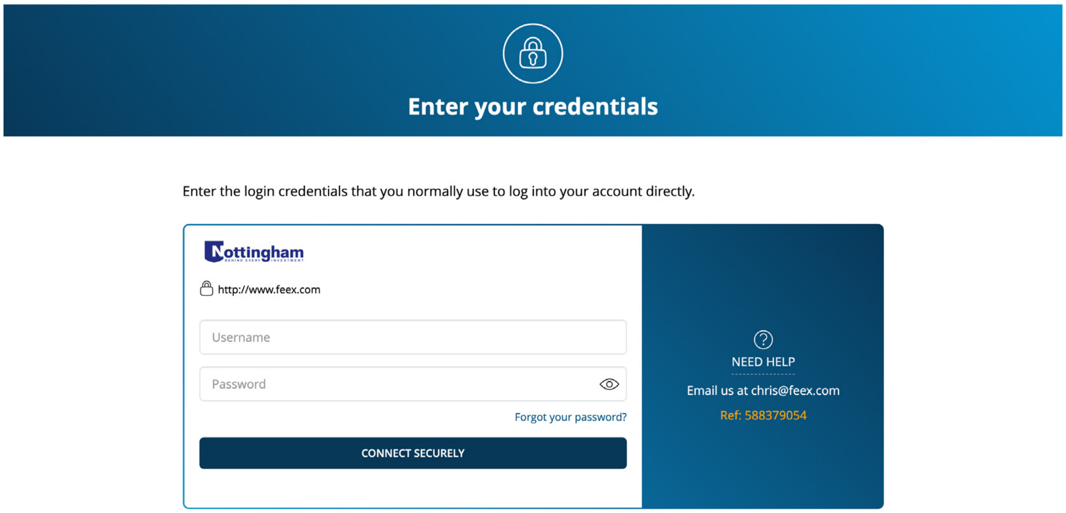
Step 3

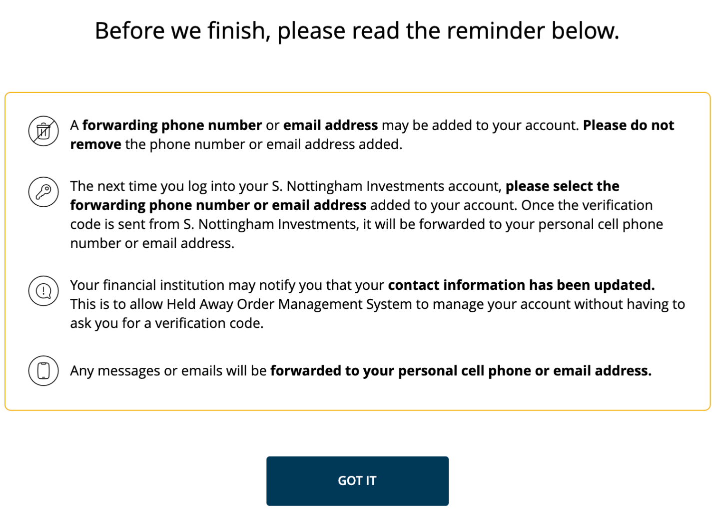
Enter the login credentials for your financial institution. You may be prompted to complete additional security fields, such as two-factor authentication or account security questions.



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.



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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)	◉ Current Employer ○ Previous Employer	☑

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.