# Portal Self-Registration Instructions

You may access The Standard's online services by creating a new account and adding the services that best fit your needs as a financial professional. This reference guide describes how to create your new account, how to log in and how to manage your profile to add a new service.

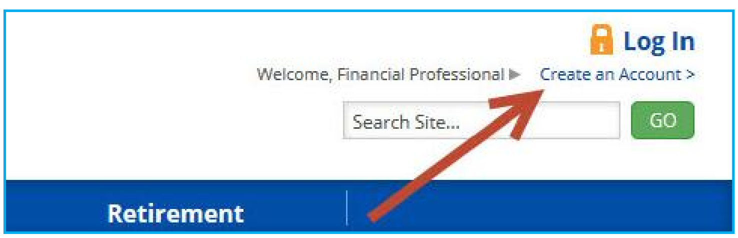
## How to Create Your New Account

If you haven't logged on to The Standard's portal before, you will need to create a new account as follows.

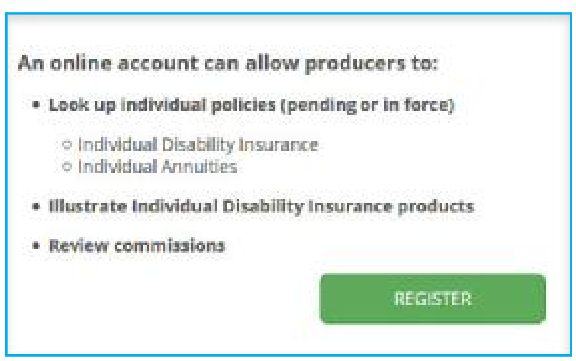
❶ Go to www.standard.com. If this is your first time visiting The Standard's website, you will be asked to identify yourself as a financial professional. You will see this screen any time you access standard.com from a new device.

Click on **I am a Financial Professional.**


❷ Then, click **Create an Account,** located near the upper-right corner of the home page. Please be sure your audience role is Financial Professional.




❸ Click **Register**, when the below screen appears.

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# Portal Self-Registration Instructions (continued)

❹ On the **Create an Online Account** page, complete the following fields:

- **First name**
- **Last name**
- **Email address**
- **Confirm email address**
- **Create a user name**

> Note: Your user name should be at least seven characters long and cannot contain any special symbols (for example #, $, %, @), punctuation or spaces.

❺ Select the check box to confirm that you have read and agreed to the **Terms and Consent** of use, and then click the **Continue** button.

❻ You will now be asked to create and confirm your **Password.**

❼ Once you've established your password, select and answer three of the **Security Questions** to assist in verifying your identity in the event you need help with your account in the future. Click **Create Account** to generate an email containing a link to confirm your initial account setup.

> Note: If you do not answer the security questions initially, you will be prompted to do so the next time you log on and, once answered, they will not appear again.

❽ The confirmation will be sent to your designated email address and contains your user name and a link you will need to select to **Confirm Your Account** (see How to Complete Your New Account on the next page for more details).

> Note: You will need to click the **Confirm Your Account** link within 24 hours to log in and complete your account setup.

## How to Complete Your New Account

The following steps outline how to complete your new account setup.

❶ Clicking the **Confirm Your Account** link in the confirmation email will take you to the **Log In** page at standard.com. Here you will see a new message indicating that "Your account has been confirmed" and that "You may log in now."

❷ Enter your **User name** and **Password**, and then click the **Log In** button to continue.

❸ On the My Home page under **Complete Account Setup**, you will see the following three access options:

- My retirement plan
- My employer's insurance benefits
- Services for financial professionals or firms

Select the third option, **Services for financial professionals or firms.**

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