

OneView Registration & Login Client Guide

What is OneView?

OneView is a free web-based reporting system that allows you access and run diverse types of reports on your accounts. This guide will demonstrate how to:

- Sign up (register)
- Log in

OneView Registration

Access to OneView is provided via an email invitation sent by your Financial Professional. You will receive two emails:

- **Invite for Registration** (First Email)
 - Tells you that you have been invited to use OneView.
 - Includes a link to register.
- **Access Code for Registration** (Second Email)
 - Contains the code you need to complete registration.
 - **Important:** This code expires in 24 hours.
 - If it expires, contact your Financial Professional to resend the invitation.

Securities and investment advisory services are offered through the firms: Osaic Wealth, Inc. and Osaic Institutions, Inc., broker-dealers, registered investment advisers, and members of FINRA and SIPC. Securities are offered through Osaic Services, Inc. and Ladenburg Thalmann & Co., broker-dealers and members of FINRA and SIPC. Advisory services are offered through Ladenburg Thalmann Asset Management, Inc., Osaic Advisory Services, LLC. and CW Advisors, LLC., registered investment advisers. Advisory programs offered by Osaic Wealth, Inc. are sponsored by VISION2020 Wealth Management Corp., an affiliated registered investment adviser.

Sample: Invite for Registration email

Invite for Registration



DONOTREPLY@albridge.com

To 

CAUTION: External Email. Do not click links or open attachments unless you recognize the sender and consider the content to be safe.

Dear Test ,

Your advisor has invited you to access Wealth Reporting and Insights (WRI). Please click the link below to accept the invitation. If the URL does not work, please copy and paste it into your browser.

<https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Foneview.v2020-sai.com%2FWebApp%2Fstmt%2FNGRegistrationServ%3Fsiteid%3D19%2Foneview&data=05%7C02%7Cmelissa.brasseur%40osaic.com%7C8e978379c9054663ad6a08de3114220f%7Cc1ef4e97eeff48b2b7200c8480a08061%7C0%7C0%7C639002159703023004%7CUnknown%7CTWfpbGZsb3d8eyIFbXB0eU1hcGkiOnRydWUslYiOiIwLjAuMDAwMCIslAI0lXaW4zMlslkFOljoITWfpbCislIdUjoyfQ%3D%3D%7C0%7C7C%7C&sdata=H7W9Neeaq8%2Fu9D9dtXS9qb6%2B8iinDBo5P%2B4RPXh6OU%3D&reserved=0>

You will be required to register, create an account, and complete the initial setup as instructed below. Please note that you will be prompted for an access code, which will be sent in a separate email.

1. After you click the URL, choose the 'Investor' option.
2. Enter your SSN/TIN and access code.
3. Follow the on-screen prompts to complete the User Agreement and Personal Information sections.

Thank You.

The information contained in this e-mail, and any attachment, is confidential and is intended solely for the use of the intended recipient. Access, copying or re-use of the e-mail or any attachment, or any information contained therein, by any other person is not authorized. If you are not the intended recipient please return the e-mail to the sender and delete it from your computer. Although we attempt to sweep e-mail and attachments for viruses, we do not guarantee that either are virus-free and accept no liability for any damage sustained as a result of viruses.

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Dear Test ,

Your advisor has invited you to access Wealth Reporting and Insights (WRI). Please use the URL from the previous email.

Your access code is:WzvnFX#Z It will expire in 24 hours.

1. After you click the URL, choose the 'Investor' option.
2. Enter your SSN/TIN and access code.
3. Follow the on-screen prompts to complete the User Agreement and Personal Information sections.

Thank You.

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How to Complete Your Registration

1. Open the Registration Link

Click the link in your **Invite for Registration** email to access the registration page.

2. Enter Your Information

- Select **Investor**.
- Enter your **SSN/TIN**.
- Enter the **Access Code** from your **Access Code for Registration** email.
- Click **Next**.

The screenshot displays the Osaic registration interface. At the top, the Osaic logo is visible. Below it, a progress bar shows four steps: Access Code (1), User Agreement (2), Personal Info (3), and Review and Submit (4). Step 1 is currently active. Under the progress bar, there are two radio button options: 'Investor' (selected) and 'Home Office User'. Below this, a prompt says 'Please enter your information below'. There are two input fields: 'SSN/TIN' and 'Access Code (What's This?)', both with masked characters and eye icons for toggling visibility. At the bottom of the form area, there are 'Cancel' and 'Next' buttons. A red arrow points to the 'Next' button. The footer contains links for 'Disclaimer', 'Privacy', and 'Cookie Notice', along with 'Web Browser and Device Compatibility'. It also includes the release version '31.2.0.0', copyright information '© 2025 VISION2020 OneView', and security logos for 'Verizon Cybertrust Security' and 'CERTIFIED ENTERPRISE'.

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3. Accept the User Agreement

Review the agreement, check **I Agree**, then click **Accept**.

osaic

Access Code User Agreement Personal Info Review and Submit

Please read the User Agreement and if acceptable select the I Agree checkbox

AUTHORIZED USERS - PERSHING X REPORTING USER AGREEMENT

This User Agreement ("Agreement") governs the use of the Pershing X Reporting platform, which may include web sites, software and/or other information made accessible in connection with the foregoing.

PLEASE CAREFULLY READ THE TERMS AND CONDITIONS SET FORTH IN THIS AGREEMENT. IF YOU ARE NOT WILLING TO BE BOUND BY THIS AGREEMENT, YOU MUST NOT ACCESS OR USE THE Pershing X Reporting Platform. BY ACCESSING OR USING THE Pershing X Reporting Platform, YOU AGREE TO THE TERMS AND CONDITIONS SET FORTH IN THIS AGREEMENT.

1. AUTHORIZED USERS, ACCEPTANCE OF TERMS.

Pershing X, Inc. and its affiliates (collectively, "Pershing X") have developed this platform, comprising certain technology, data, and other services of Pershing X and other parties (collectively, the "System").

any countries for which the United States government requires an export license or other supporting documentation at the time of export or transfer, unless You have obtained prior written authorization from the United States Office of Export Control or other authority responsible for such matters.

***** below is the text regarding the click to accept box which may need to be adjusted depending on how you do the click to agree.

If You agree to the foregoing Terms and Conditions, please indicate your agreement by clicking the box labeled "I agree." If you do not agree to these Terms and Conditions, please click "I do not agree" and do not use the System or any related web sites, software or services at this time.

☒ I Agree

Cancel Accept

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4. Complete Required Fields

Fill in all fields marked with an asterisk (*), then click **Next**.

osaic

Access Code User Agreement Personal Info Review and Submit

1 2 3 4

Login Information

This phone number and email address will be used for all subsequent logins and 2-step verification.

E-Mail

(This will be your login id)

Mobile Phone* US +1

Personal Information

Prefix

First Name* Test

Middle Initial K

Last Name*

Suffix / Designation

Evening Phone

Fax

Address* 123 Sample

Address 2

City* Atlanta

State* Georgia

Country* United States

Zip Code* 30349

Date of Birth*

Registration FAQs

- All fields marked with an asterisk (*) are required and must be entered.
- Please enter the information requested with care as the information you enter at this point will carry to your performance reports.

Questions?

- If you have any questions, please reach out to your financial institution.

Previous Cancel Next

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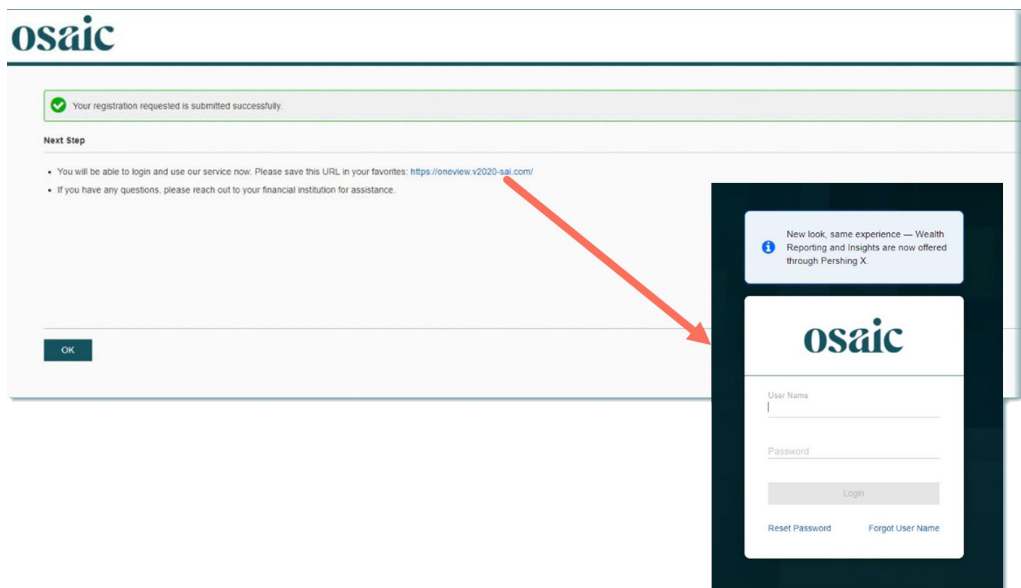
5. Review and Submit

Review your details and click **Submit**.

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6. Finish and Save Your Login Link

- A confirmation message will appear.
- Save the login link, located on this page to your browser for future access.
- Here is the URL for reference: <https://oneview.v2020-sai.com/>



You are now registered for OneView. Next, let us go over how to log in moving forward.

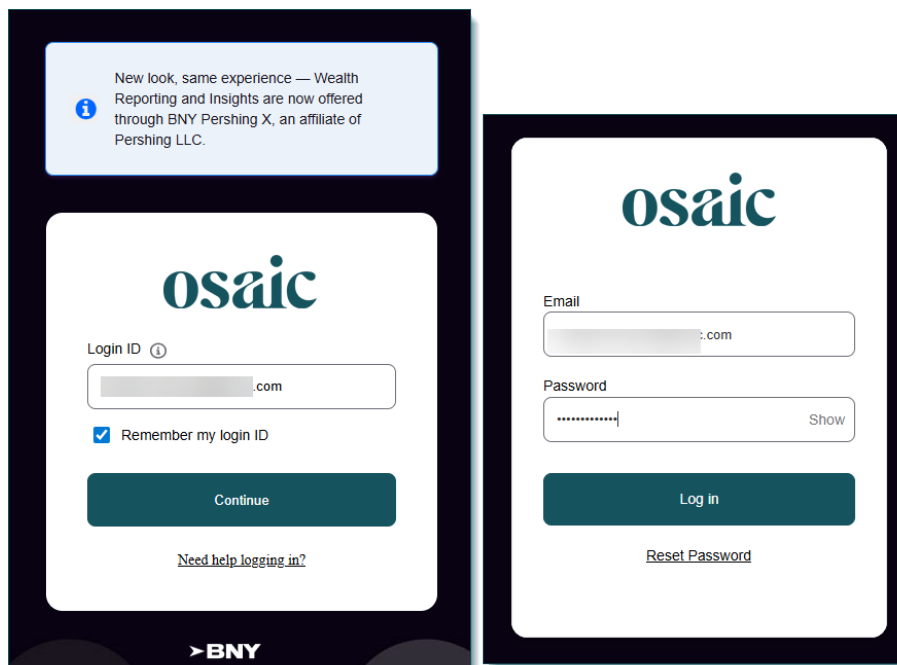
Accessing OneView

Enter Login Credentials

Launch OneView from the URL you saved in your browser
<https://oneview.v2020-sai.com/>

Enter *Login ID* (will be your email address if you set up 2-step verification) and select **Continue**.

Enter *password* and select **Log in**.



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Complete 2-step verification

Choose your 2-step verification method and select **Continue**.

Enter the code, select **Verify Code** to complete the verification process and access the platform.

Attention! Existing Users

Action Required: Set Up Multi-Factor Authentication (MFA)

When you log in using your current URL, OneView will automatically check if MFA is enabled for your account. If MFA has *not yet been set up*, you will be redirected to a new MFA setup screen.

To complete the process:

1. Follow the on-screen instructions to configure MFA.
2. If you need assistance, click “**Need help logging in?**” at the bottom of the login page to access a detailed [PDF guide](#).
3. Once you complete the MFA process, [save the new URL to your browser](#).

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