**HOW TO SERIES** 

# **Linking Your Accounts**



This guide explains how to link your Morgan Stanley accounts for streamlined online access to your shares and cash using a single log on.

- Your **Morgan Stanley at Work stock plan account** holds your plan shares and can also hold cash.
- Your Morgan Stanley **Wealth Management account** holds cash or non-plan related shares you may have.

These accounts are viewable on two separate sites:

- Morgan Stanley at Work stock plan account (stock plan shares and associated cash)
- Morgan Stanley Online (cash and non-plan related shares)

## **STEP 1: CALL**

To link your accounts, contact the **Morgan Stanley Service Center**. Service Center numbers are found on the last page of this guide. Provide the Service Center representative with the account numbers you want to link. Once your accounts are linked from the Amazon Stock Portal, you can access your Morgan Stanley Online accounts through your stock plan account.

Note you will need to be registered on Morgan Stanley Online to link your accounts. For guidance on how to register, please view the **How to Register on Morgan Stanley Online** section below.

## **STEP 2: LOGIN**

**LOGIN** to your stock plan account from the Amazon Stock portal by clicking **Go to Morgan Stanley at Work stock plan account** in the top right corner of the portal homepage

Note: Web browser supporting Cookies and Secure Sockets Layer (SSL) are required to access the web site

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**STEP 3: VIEW LINKED MORGAN STANLEY** ACCOUNTS

Your stock plan account details are available on your Dashboard:

> Available value displays the value currently accessible for exercise or sale, including any awards pending release and all vested grants.

Unavailable value displays the amount currently inaccessible, including future vesting values.

Your linked Morgan Stanley Wealth Management accounts now also appear on your Dashboard:

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Linked Morgan Stanley Wealth Management accounts will appear here in the Wealth Management Accounts section of your Dashboard. To get more detail on a specific account, click the account number, which will take you to your account details on Morgan Stanley Online.

Note: To access Morgan Stanley Online, you will need to register there. For registration guidance, please go to How to Register on Morgan Stanley Online below.

View more details of your Wealth management Accounts on Morgan Stanley Online

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All screenshots are for illustrative purposes only.

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\$120 40k

\$95.30k

#### STEP 4: RETURN TO YOUR STOCK PLAN ACCOUNT FROM MORGAN STANLEY ONLINE

Click the **information icon** located beneath the LOG OUT button.



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## Information, Support & More

#### The Morgan Stanley Online Tax Center

Access the Morgan Stanley Online Tax Center to get the information you need for this year's tax season.

#### The Morgan Stanley Global Investment Committee

The Global Investment Committee (GIC) is a group of seasoned professionals who determines the investment outlook that guides our advice to clients. Ask your Financial Advisor to subscribe you for email alerts to GIC publications.

#### Provide feedback on Morgan Stanley Online

We are always looking to improve the Morgan Stanley Online experience.

#### CONTACT US

For support, questions or to report fraud 24 hours, 7 days a week

US: 1(888) 454-3965

International: 1(801) 617-9150 (call collect)

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Below OTHER SITES, click

account Dashboard.

Morgan Stanley at Work stock plan account to return to your stock plan

Update Profile + Settings

Find an Advisor/Branch

Online Security Center Morgan Stanley at Work

stock plan account

Help + Support

Go Paperless

**OTHER SITES** 

## HOW TO REGISTER ON MORGAN STANLEY ONLINE

#### **STEP 1: ENROLL**

 Click Enroll to begin the Morgan Stanley Online registration process. This will enable you to navigate between your stock plan account and Morgan Stanley Online using the same username and password.

Note: Non-U.S. participants cannot enroll online. Please contact the <u>Morgan Stanley</u> Service Center.

## Morgan Stanley

#### Benefits of Morgan Stanley Online

single logon, click on the 'Enroll' button below. Once ei	to you can navigate between stockplanconnect.com and MS
Online to see holding details, quotes, trading and chec	ks (as applicable) using the same User Name and Password.
If you do not have a Morgan Stanley brokerage accour	t and you are interested in learning more about MS Online, click th
'Learn More' link below. You can always contact the M	organ Stanley Financial Advisor assigned to your plan. Note that the
Financial Advisor assigned to your plan may be differe	trom the Financial Advisor that mananes your individual
brokerage account. To obtain contact information for th	e Financial Advisor assigned to your plan, you will need to logon to
stockplanconnect.com, click on the 'My Profile' tab, 'Pa	rticipant Information' and scroll down to the Financial Advisor

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#### **STEP 2: REGISTER**

The **Online Registration** page will vary depending on the authentication process necessary for you to enroll in Morgan Stanley Online (MSO). There are two possible processes detailed in Steps 2A and 2B. **Only one will apply to you**.

**STEP 2A:** If your credit information is available to Morgan Stanley, you will be asked to answer credit-based questions. Answer the questions and click **Continue**. If you answer the questions correctly, you will proceed to Step 3.

lorgan Stanley			
organ Stanley Online Registration			
legistration Code (Step 2 of 3)	Registration Help		
To proceed with your Morgan Starley Online registration, please answer these security questions within 5 minutes. If you do not answer these security questions within the 5 minutes you will need to consist the Chen Service Center to complete registration at 1 (301) 454-3065 (24 hours a day, 7 days a week). If you are outside the United States, you can call object at 1 (301) 417-9150.	Why do I need to answer these security questions?     These question don't seem to apply to me what should I do?		
Based on our records, you opened an auto loan in or around December 2016. Select the tender for this account. O AR ACADEMY FOU O TOYOTA MOTOR CRED O BANK AMERICA O YOUYO FIN O HOKE OF THE ABOKEDOES NOT APPLY	Contact Customer Service Representative?		
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Continue			

All screenshots are for illustrative purposes only and subject to change.

STEP 2B: If credit information is not available to Morgan Stanley, you will need to register using a one-time registration code. Select the delivery method to receive a Registration Code. You can choose:

#### Text or Call

Next, click Get Registration Code. The code will be sent via the method you selected.

Retrieve your Registration

Click Continue.

#### Morgan Stanley

#### **Online Registration**



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#### **STEP 3: LOGIN**

Enter the password you use for your stock plan account.

#### Click Continue.

#### Morgan Stanley

#### **Online Registration**

Since you already have a StockPlan Cor simply enter that password to continue w	nnect username and password associated with your Social Security Number, ith Morgan Stanley Online registration.	Which username is shown here?
to continue the online registration please	enter your username and the Password.	What if I want to use a different username?
UserName:	[Username will show here]	What if I don't remember my password?
* Password:	Forgot your password ?	• What if I need help?
	Cancel	h

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### **STEP 4: COMPLETE** AND CONFIRM

Complete your Online Account Profile. You will need to respond to the following:

a Verify your email address.	space provided. If you need to update your email address, click the Edit link.
	User Name: [Username will show here]
B Read and review the Terms	Email Address: [Email will show here]
and Conditions and click the	
	Terms and Conditions
checkbox.	<ul> <li>I certify that I have read and agree to the Morgan Stanley Online Terms and Conditions.</li> </ul>
c Read information on real-time	Do you need real-time or delayed market data?      c
and delayed market data.	What you need to know before deciding between real-time and delayed market data
d Select preference: no or yes.	Morgan Stanley Online provides real-time or delayed market data, based on your choice, at no cost to you. Real-time market data includes bid, offer, latest trade price, price change and volume on exchange-traded instruments, which are displayed within Morgan Stanley Online when U.S. exchanges are open for business (i.e. between 9:30 a.m. and 4:00 p.m. ET). <u>Real-time prices reflect the latest price from the market upon page load or refresh.</u> Delayed market data includes changes in prices and volumes on exchange-traded instruments, which are displayed within Morgan
Click Register	Stanley Online delayed up to 15-20 minutes, depending on the exchange where the instrument trades.
	If you wish to access real-time market data, the exchanges that provide this data (the NYSE, NASDAQ and OPRA) require you to agree to their terms and conditions and the NYSE requires you to answer a set of questions that will determine your status as either a securities professional or nonprofessional subscriber, and to re-affirm your status on a regular basis. Note: Access to Morgan Stanley Online trading order entry requires that you choose real-time market data.
	If delayed data is satisfactory, you can choose that option below and be immediately taken to the Morgan Stanley Online Home page.
	Click here for additional information.
d	No, I wish to access real-time market data.
	Yes, delayed data is fine. I acknowledge I can enroll later in real-time market data via Profiles + Settings.
	Cancel Register

#### STEP 5: **CONFIRMATION** Morgan Stanley View a confirmation of your Thank you for registering to Morgan Stanley Online enrollment in Morgan Stanley а Confirmation Online. Your enrollment is now Congratulations! You have successfully registered your account on Morgan Stanley Online and may now view your account information online. complete. Go to Morgan Stanley Online b To exit registration and continue your online session, simply click All screenshots are for illustrative purposes only and subject to change. Go to Morgan Stanley Online.

## Need Help?

For assistance, please call a Morgan Stanley Service Center

For **Canada, Mexico, United States:** (Toll-Free) **+1-866-533-2575** Hours: 8 A.M. to 8:00 P.M. ET (Eastern Time)

## All Other Countries (or if unable to connect):

Hours: 24 hours a day; Monday - Friday Visit <u>AT&T Direct Toll-Free Access Codes website</u> and dial the appropriate Access Code for your country, then **833-500-0341**.

## Staffed languages:

French (during EMEA business hours), Cantonese, Japanese, Mandarin (during Asia Pacific business hours) plus translation available in 200+ languages through Language Line Solutions.

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