

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

STEP 3: VIEW LINKED MORGAN STANLEY ACCOUNTS

Your stock plan account details are available on your **Dashboard**:

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

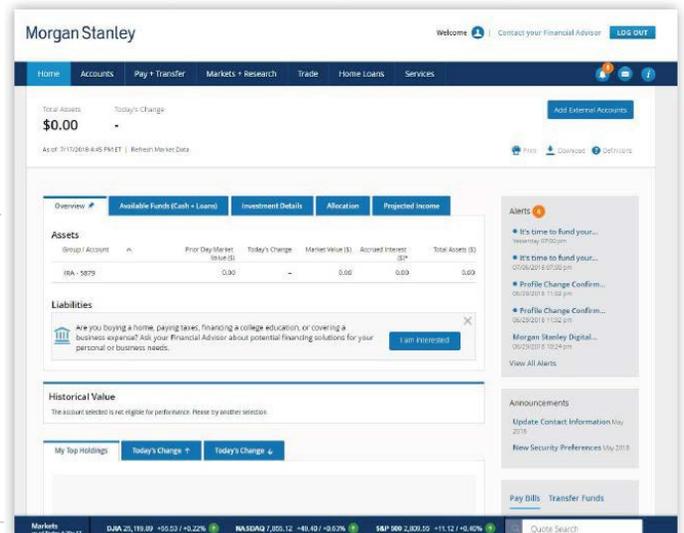
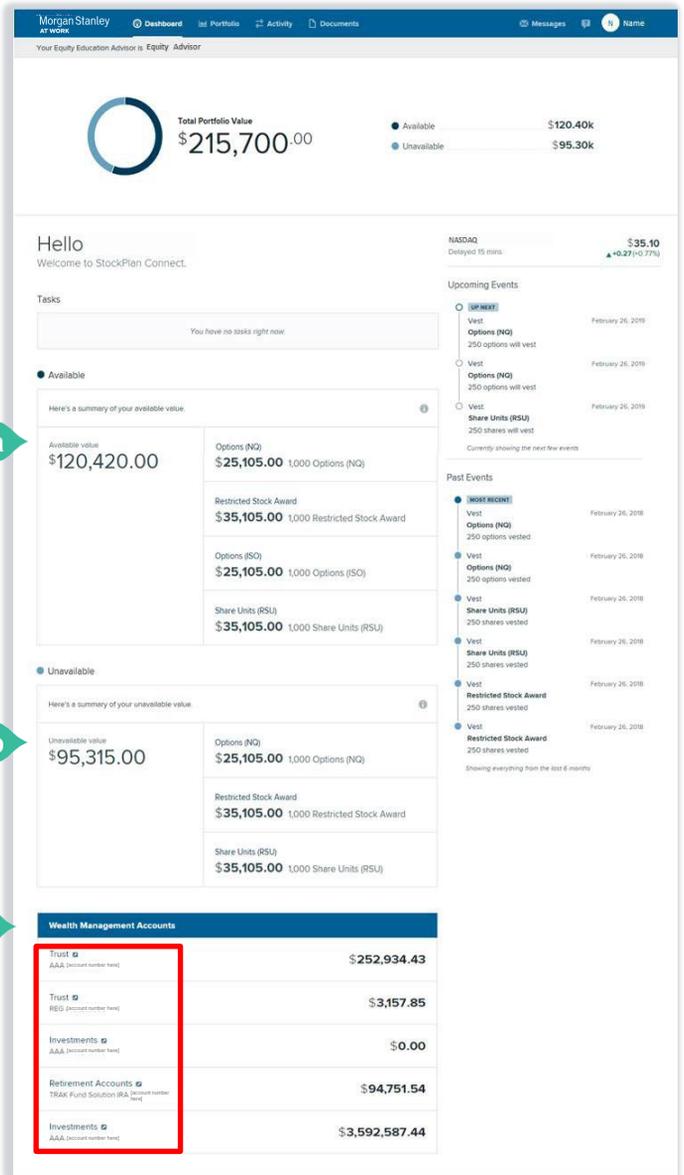
b **Unavailable value** displays the amount currently inaccessible, including future vesting values.

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

c 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.

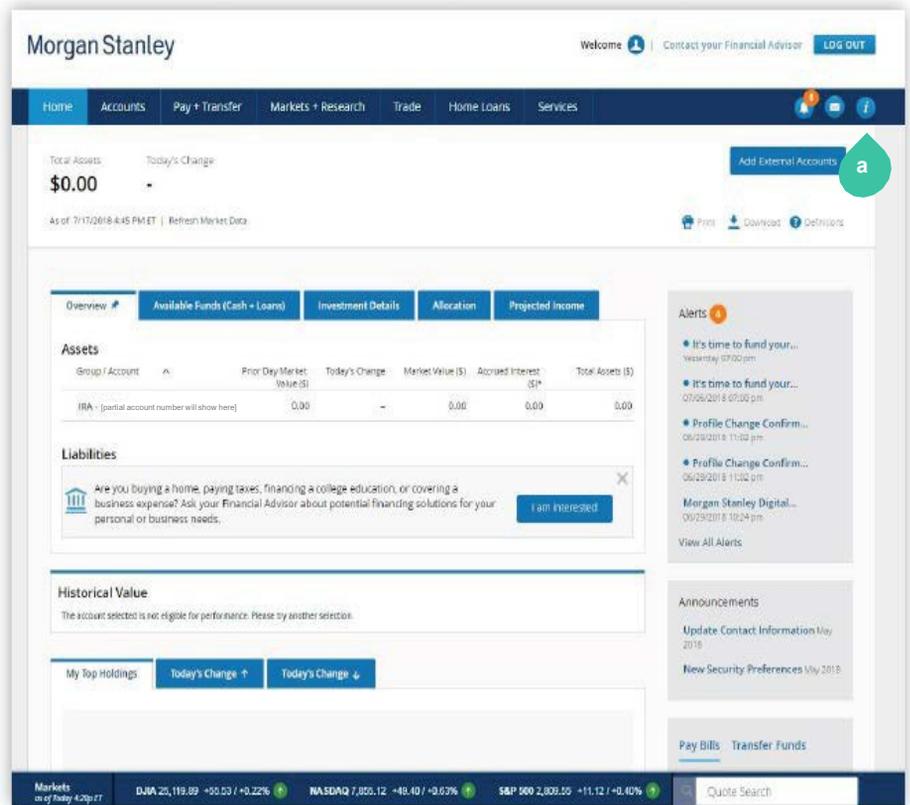
Note: To access Morgan Stanley Online, you will need to register there. For registration guidance, please go to **How to Register on Morgan Stanley Online** below.

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



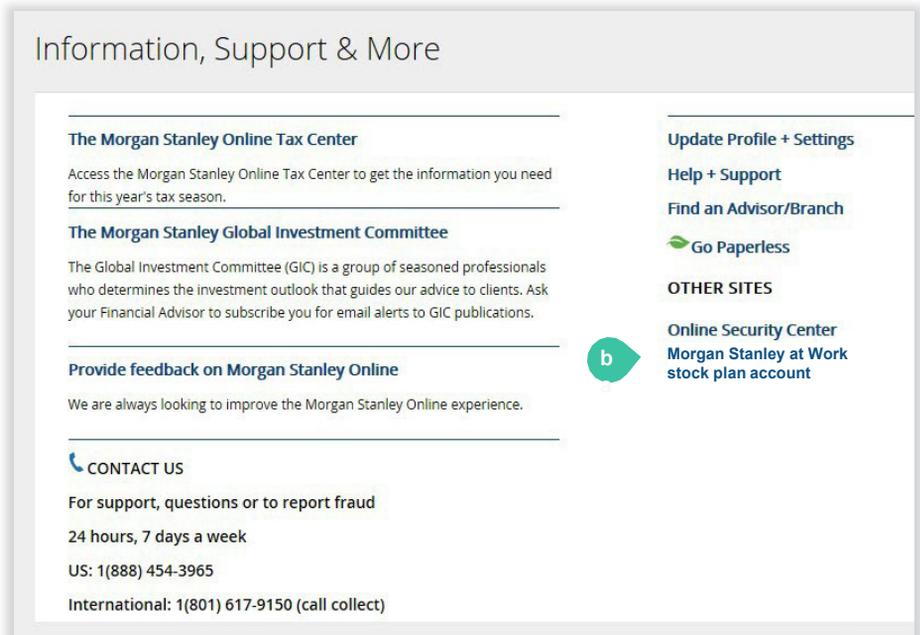
STEP 4: RETURN TO YOUR STOCK PLAN ACCOUNT FROM MORGAN STANLEY ONLINE

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



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

b Below **OTHER SITES**, click **Morgan Stanley at Work stock plan account** to return to your stock plan account **Dashboard**.



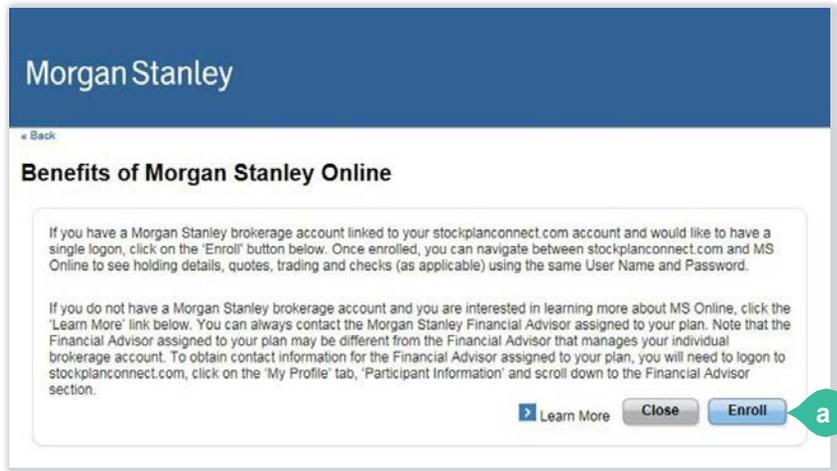
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HOW TO REGISTER ON MORGAN STANLEY ONLINE

STEP 1: ENROLL

a 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 **Morgan Stanley Service Center**.

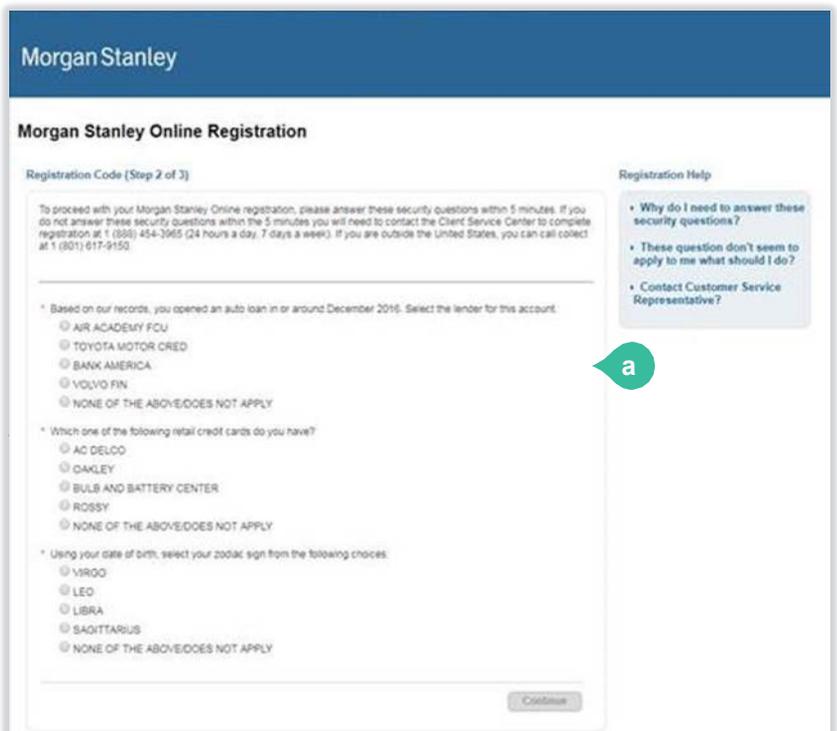


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STEP 2: REGISTER

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.



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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:

b Text or Call

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

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Online Registration

Registration Code (Step 2 of 3)

Registration codes provide an additional layer of security when verifying your identity, since they will only be sent using contact information already in your account records.

Once you select a delivery method, you will be asked to confirm your registration code.

Please note that registration codes expire within 15 minutes of receipt. If your code expires, you will need to request a new code.

Registration Code Delivery Method

Please choose a delivery method, and click the "Get Registration Code" button.

If you require assistance, please contact your Financial Advisor or the Client Service Center. Representatives are available 24 hours a day, 7 days a week and can be reached at 1 (888) 454-3665 or 1 (801) 617-9150 (collect calls accepted from overseas).

Note: By choosing to receive your one-time Security code by SMS (text), you are consenting to receive text messages from Morgan Stanley. Standard telecommunications, data fees and text messaging rates may apply based on your plan with your mobile phone carrier.

Text: xxx-xxx-xxx-8613 Please ensure that your mobile device is enabled to receive text messages.

Call: xxx-xxx-xxx-8613

Cancel Get Registration Code

Registration Help

- Is there another way to receive a registration code?
- What if my phone number has an extension?

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d Retrieve your **Registration Code** and enter it into the field.

e Click **Continue**.

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Online Registration

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Registration codes provide an additional layer of security when verifying your identity, since they will only be sent using contact information already in your account records.

Once you select a delivery method, you will be asked to confirm your registration code.

Please note that registration codes expire within 15 minutes of receipt. If your code expires, you will need to request a new code.

Registration Code Delivery Method

Please choose a delivery method, select a phone number or email address, and click the "Get Registration Code" button.

If your phone number is not listed, contact your Financial Advisor or the Service Center. Representatives are available 24 hours a day, 7 days a week and can be reached at 1 (888) 454-3665 or 1 (801) 617-9150 (collect calls accepted from overseas).

Text: xxx-xxx-9999

Call: xxx-xxx-9999

Enter Registration Code

We have sent a registration code via the delivery method you selected. Enter this code in the field below to continue.

Registration Code:

Change Delivery Method

Cancel Continue

Registration Help

- Is there another way to receive a registration code?
- What if my phone number has an extension?

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STEP 3: LOGIN

a Enter the password you use for your stock plan account.

b Click **Continue**.

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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.

b Read and review the **Terms and Conditions** and click the checkbox.

c Read information on real-time and delayed market data.

d Select preference: no or yes.

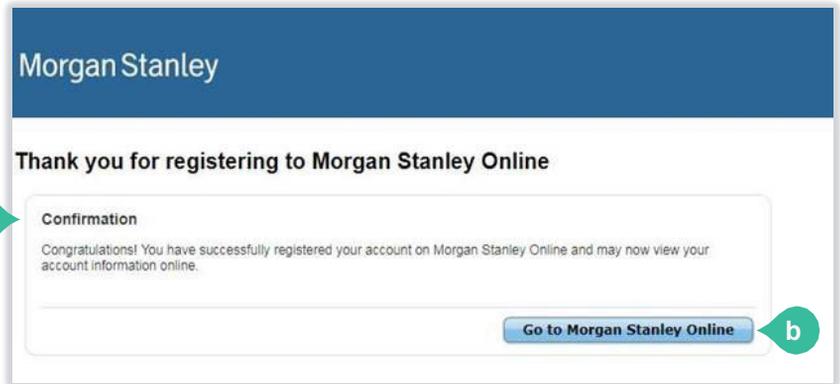
e Click **Register**.

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STEP 5: CONFIRMATION

a View a confirmation of your enrollment in Morgan Stanley Online. Your enrollment is now complete.

b To exit registration and continue your online session, simply click **Go to Morgan Stanley Online**.



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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 [AT&T Direct Toll-Free Access Codes website](#) 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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