

How Access Your Account (Participant)

In this guide, we'll walk you through the initial process of accessing your account on <https://ftcplanaccess.com/participant>.

1. Go to: <https://ftcplanaccess.com/participant>
2. In the middle of the page, click on **Activate Your Account**



ACCOUNT LOGIN

Continue

- Retrieve Login ID
- Reset Password
- Activate Your Account**

TOUR THE SITE 

WELCOME

3. Enter your 9 digit Social Security Number (no dashes)



ENTER SSN

Cancel

Continue

4. Enter your **Default PASSWORD** and click **Log In**
 - a. Your default password will be your date of birth in the format MMDDYYYY
 - i. For example, if you were born on December 12, 1980 your password would be 12121980



ENTER YOUR DEFAULT PASSWORD

DEFAULT PASSWORD:

Cancel

Log In

5. After you click **Log In**, a Terms & Conditions will pop-up
6. Review the Terms & Conditions of the website
7. If you have read, understood, and accept the terms and conditions select the box and click **Continue**
 - a. If you do not agree/accept, click on **I Do Not Accept Terms**
 - i. You can then reach out to your financial professional or FTC Service Center (877-500-9590) to obtain account information



DISCLAIMER

TERMS AND CONDITIONS:

10.3 The ability of the parties to obtain documents, witness statements and other discovery is generally more limited in arbitration than in court proceedings.

10.4 The arbitrators do not have to explain the reason(s) for their award, unless, in an eligible case, a joint request for an explained decision has been submitted by all parties to the panel at least 20 days prior to the first hearing date.

10.5 The Panel of Arbitrators will typically include a minority of arbitrators who were or are affiliated with the securities industry.

10.6 The rules of some arbitration forums may impose time limits for bringing a claim in arbitration. In some cases, a claim that is ineligible for arbitration may be brought in court.

10.7 The rules of the arbitration forum in which the claim is filed, and any amendments thereto, shall be incorporated into this agreement.

10.8 No person shall bring a putative or certified class action to arbitration, nor seek to enforce any pre-dispute arbitration agreement against any person who has initiated in court a putative class action; or who is a member of a putative class who has not opted out of the class with respect to any claims encompassed by the putative class action until: (i) the class certification is denied; or (ii) the class is decertified; or (iii) the customer is excluded from the class by the court. Such forbearance to enforce an agreement to arbitrate shall not constitute a waiver of any rights under this agreement except to the extent stated herein.

11. **Arbitration Agreement.** In consideration of opening one or more accounts for you, you agree that any claims or controversy arising between you and FTC and/or your representative(s), and their parents, subsidiaries, affiliates, officers, directors, employees, agents, and Third-Party Service Providers (whether or not a signatory to this Agreement), arising out of or relating in whole or in part to your account, transactions with or for you, this agreement or any other agreement you have entered into with the parties hereto, or the construction, performance, or breach of this agreement, or any other agreement you have entered with the parties hereto, whether entered into prior, on or

I have read, understand and accept the terms and conditions described above.

I Do Not Accept Terms

Continue

8. Next, you will need to enter your current password – MMDDYYYY
9. Enter your new password
 - a. The new password must be at least 6 but no more than 8 characters
 - b. Password must contain at least 2 alpha characters and 2 numeric characters
10. Confirm your new password
11. Click [Continue](#)



CHANGE PASSWORD

PERSONALIZE YOUR LOGIN INFORMATION

CHANGE PASSWORD

Current Password:

New Password:

(Password must be at least 6 but no more than 8 characters
(Password must contain at least 2 alpha characters and 2 numeric characters.)

Confirm New Password:

Cancel

Continue

12. The next screen will require you to setup a security profile
13. Click [Add a Delivery Method](#)



ESTABLISH SECURITY PROFILE

SECURITY CODE DELIVERY

For your security, add a phone number or email address to be used to send you a security code in the future.

[Add a Delivery Method](#)

Cancel

Continue

14. You will see a popup that allows you to select from:
 - a. Mobile Phone for Text
 - b. Email

The screenshot shows the 'ESTABLISH SECURITY PROFILE' page for the Fiduciary Trust Company of New Hampshire. A modal window titled 'ADD A DELIVERY METHOD' is displayed. The modal contains the following text: 'Select how you would like to receive security codes, then enter your information, and click 'Send Code''. Below this is a dropdown menu with 'Mobile Phone for Text*' selected and an empty input field. A disclaimer states: '* Fiduciary Trust Company Account Alerts will be sent to your phone from # 23200. Msg & Data Rates May Apply. Text STOP to Cancel, HELP for Help. You will only receive one message per interaction. Call 1800444DSTS for Help.' Below the disclaimer, it says 'Terms & Conditions are located here. The mobile phone number provided here will not replace any mobile phone numbers on file for your account.' At the bottom of the modal are 'Cancel' and 'Send Code' buttons.

15. If you select
 - a. Mobile Phone for Text
 - i. Enter your 10 digit mobile number with no dashes XXXXXXXXXX
 - b. Email
 - i. Enter your email address
16. Click **Send Code**
17. Verify Security Code screen will pop up and you will have 2 minutes to retrieve your code (from your text message or email)

ESTABLISH SECURITY PROFILE

SECURITY CODE DELIVERY

For your security, add a phone number or email address to be used to send you a security code in the future.

[Add a Delivery Method](#)

Cancel

VERIFY SECURITY CODE

We sent a security code to the device selected. Enter the code and click 'Verify Code'.

Security Code

TIME REMAINING: 01:42 [Need another code?](#)

Cancel [Verify Code](#)

18. Enter your 8 digit code from FTC Alerts
19. Click [Verify Code](#)
20. Popup boxes will close and you can click [Continue](#)

ESTABLISH SECURITY PROFILE

SECURITY CODE DELIVERY

For your security, add a phone number or email address to be used to send you a security code in the future.

Mobile Phone for Text: ***-***-****

Do you want to [add another delivery method?](#)

Cancel

[Continue](#)

21. You can now access your account by click on [Access My Account](#)



SECURITY PROFILE CONFIRMATION

YOUR SECURITY PROFILE SETTINGS

SECURITY PROFILE SETTINGS HAVE BEEN SAVED.

YOUR PASSWORD HAS BEEN UPDATED.

YOUR SECURITY CODE DELIVERY METHODS HAVE BEEN UPDATED.

SECURITY CODE DELIVERY

Mobile Phone for Text: ***-**-3838

[Access My Account](#)

This material was created for educational and informational purposes only and is not intended as ERISA, tax, legal, or investment advice. If you are seeking investment advice specific to your needs, such advice services must be obtained on your own separate from this educational material.

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