



**E\*TRADE Advisor Services Online Account Access Instructions and Document Delivery Options**

Account owners will receive a welcome letter from E\*TRADE Advisor services, included in the packet will be a temporary username to access the account. The initial password will be their social security number or tax identification number to log in for the first time.\*

**Online Account Access Instructions**

1. Access Atlas Capital Management website: [www.atlascapitalmanagement.com](http://www.atlascapitalmanagement.com)
2. Hover over Login option across the top; then click on Account Login
3. Username is the temporary username received in the welcome letter
4. Password is the full Social Security or Tax ID # (numerical characters only, no dashes or spaces)

You will be presented with a prompt to update the username. After entering a valid username, click continue to proceed to the password change screen

Enter the SSN or TIN used to login as the Current Password and then Choose and Confirm a New Password. (Passwords require at least 8 characters but no more than 32, one uppercase letter, one lowercase letter and one number)

You will then be asked to choose a security question and an image  
You will then need to Agree/Disagree to the Liberty User Agreement

**\* Should you require any assistance please contact Atlas Capital Management at 800.237.3714**

**Online Delivery of Statements, Proxies, Tax Documents**

Click on About Your Account: Account Information, Documents and Settings (fifth tab at the top of the page)

Next, click on Document Delivery Options

Click the Edit Button

Need to enter e-mail address if not already entered

Choose delivery of statements via e-mail

Click box at bottom left of tab to agree to terms and conditions

Click "Save" box at the bottom right of the tab