

## **Secure Email Encryption**

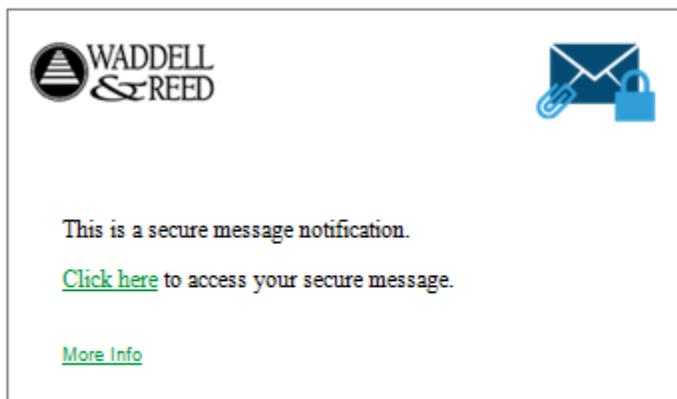
Waddell & Reed Financial Advisors use Proofpoint Message Encryption to send secure email messages. The Proofpoint system requires a one-time registration then a short log in process to access all future secure messages and is compatible with both computers and mobile devices. This intuitive process should minimize any challenges in accessing secure messages, but in the event that further support is needed, please reference this aide or contact your Advisor.

## **Why Use Email Encryption:**

At Waddell & Reed, we believe that protecting client information is one of our fundamental responsibilities. Secure message encryption is a critical security measure our Advisors take to help insure your information is kept secure.

## **Receiving and Accessing a Secure Message:**

Recipients of the secure message will receive the following email notification



Disclaimer: This email and its content are confidential and intended solely for the use of the addressee. Please notify the sender if you have received this email in error or simply delete it.

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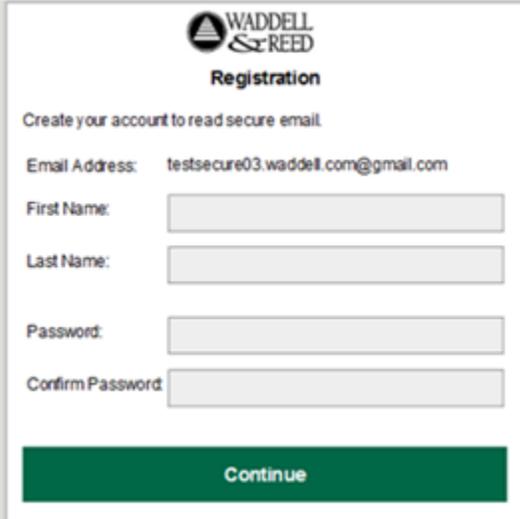
Click on the “[Click here](#)” link, and your web browser will automatically open a web page prompting you to either:

- Create an account and register, if this is your first time receiving a secure message from Proofpoint or;
- Log in, if you have previously registered

# Proofpoint Secure Message Email Encryption Aide

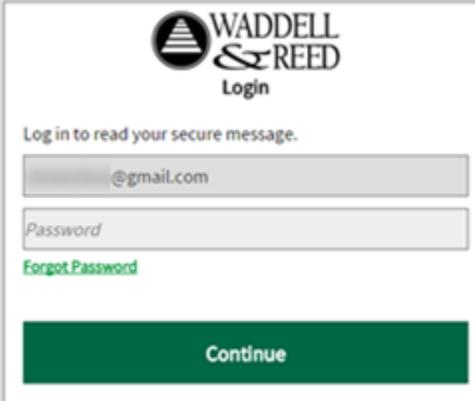
## Examples:

Initial account registration:



The registration form features the Wadell & Reed logo at the top. Below the logo, the text reads "Registration" and "Create your account to read secure email." The form includes input fields for "Email Address" (pre-filled with "testsecure03.waddell.com@gmail.com"), "First Name", "Last Name", "Password", and "Confirm Password". A green "Continue" button is located at the bottom of the form.

Log in to existing account:



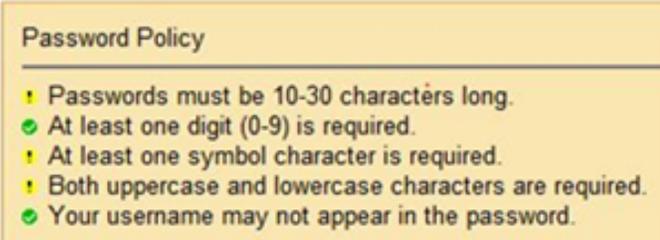
The login form features the Wadell & Reed logo at the top. Below the logo, the text reads "Login" and "Log in to read your secure message." The form includes input fields for an email address (pre-filled with "@gmail.com") and a "Password" field. A green "Forgot Password" link is located below the password field. A green "Continue" button is located at the bottom of the form.

## Setting Password at Registration:

When setting your password, a pop-up screen will appear with yellow exclamation points and green checks next to each policy. As each password character is entered, the yellow exclamation points will automatically change to green checks when each Password Policy is met.

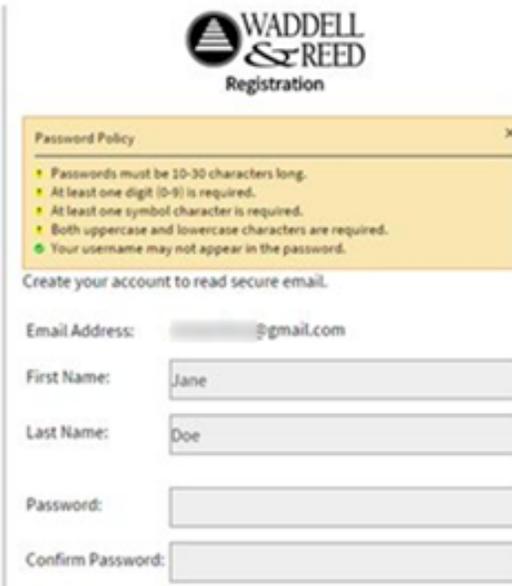
**Make sure all 5 policies have a green check next to them before proceeding.**

Example:



The Password Policy pop-up screen lists five requirements for the password:

- ⚠ Passwords must be 10-30 characters long.
- ✅ At least one digit (0-9) is required.
- ⚠ At least one symbol character is required.
- ⚠ Both uppercase and lowercase characters are required.
- ✅ Your username may not appear in the password.

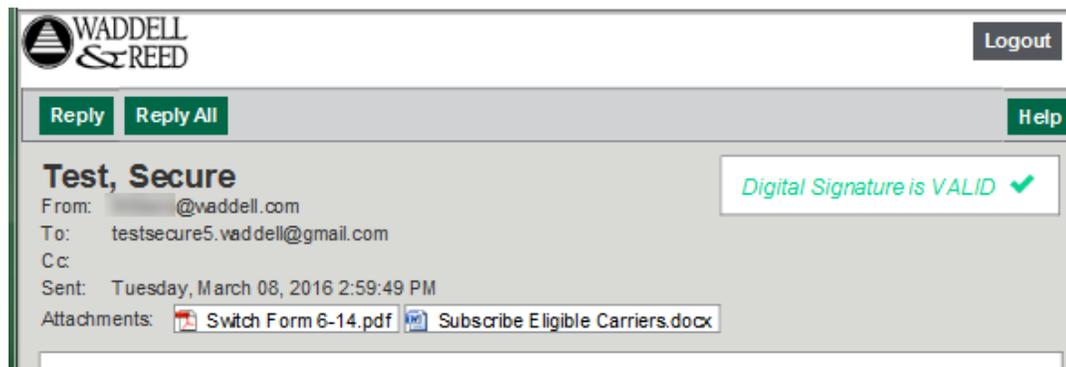


The registration form is shown with the Password Policy pop-up screen overlaid. The form fields are pre-filled with "Jane" for First Name, "Doe" for Last Name, and "@gmail.com" for Email Address. The Password and Confirm Password fields are empty. The pop-up screen is the same as the one shown in the previous block.

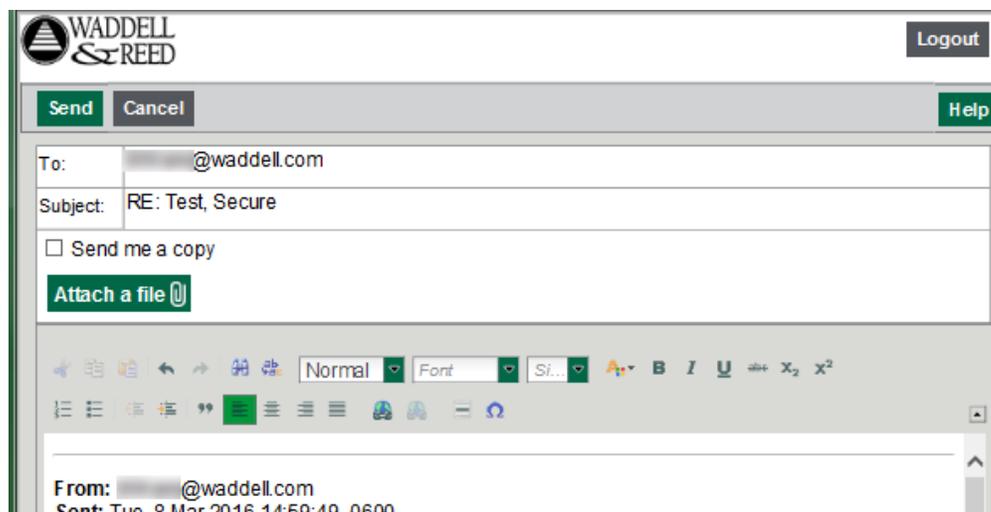
# Proofpoint Secure Message Email Encryption Aide

## Reading and Replying to a Secure Message:

- Once logged in, the secure message will look and function similar to most email systems.
- You will be able to read the body of the message, open attachments, etc.



- If you need to respond to the message, click Reply. You can then type a message in the body, attach files, and upon clicking Send, the response will be encrypted and sent securely back to your Advisor.



**Note – Attachment Limits:** Secure email attachments are limited to 15 MG per attachment and limited to a total of 20 MG for all attachments

- Once the message is sent, you will get a confirmation, and then given the option to Return to Message or Logout

