



# Manage Your Account with Morgan Stanley Online

## SUMMARY

Morgan Stanley Online delivers secure, convenient, online access to your Morgan Stanley accounts. It helps you stay informed so you and your Financial Advisor can work together to make decisions. Simply register for Morgan Stanley Online and you will be able to:

- View and manage your account any time
- Take advantage of the latest research and news, online trading, online Bill Pay and Transfers (as applicable)
- Enroll in eDelivery to be notified when your statements, tax forms, trade confirmations and other important account documents are available online
- Give family members and trusted professionals access to view your accounts

## MORGAN STANLEY ONLINE FEATURES

### VIEW AND MANAGE YOUR ACCOUNTS ONLINE

- Easily navigate between your Account Summary, Activity, Holdings, Gain/Loss, and Account Documents
- Customize your Account Summary Home Page and online experience based on your priorities, preferences and interests
- Filter and sort to view the specific data, balances, and totals you need
- Get one-click access to holding details, quotes, trading, and checks (as applicable)
- View and download current and historical statements, trade confirmations, tax documents, general correspondence, reports, and agreements

**Morgan Stanley**

Help & Support | Your Profile & Settings | Log out  
Your FA is [icon] | You have 1 Unread message [icon]  
Last Login 12/10/2012 10:02 AM ET

PORTFOLIO | MARKETS & RESEARCH | FINANCIAL TOOLS | TRADE | TRANSFER | PAY BILLS

Summary | Holdings | Activity | Gain/Loss | Account Documents | OneView

### Account Summary Home Page

Filter: All Accounts [dropdown] [Apply]

Page Retrieved On 12/10/2012 10:55:23 AM Eastern Time

#### All Accounts

Account	Acct. value	Cash/MMF/Dep.	Priced assets	Accr. Int.	Today's Change	Today's Change %
Invest account for a newly old trust - 0279	\$9,751.75	\$2,564.87	\$7,186.87	0.01	-13.04	-0.13
0279	\$15,093.38	\$12,661.30	\$2,432.04	0.04	-10.04	-0.07
<b>Total</b>	<b>\$24,845.13</b>	<b>\$15,226.17</b>	<b>\$9,618.91</b>	<b>0.05</b>	<b>-23.09</b>	<b>-0.09</b>

#### Asset Summary

	Current value	Prev. close	Today's Change	% of assets
<b>Cash/MMF/Dep.</b>				
Cash	\$1.70	--	+1.70	0.01
MMF And Bank Deposits	\$15,224.47	\$15,224.47	--	61.28
<b>Priced assets</b>				
Stocks / Options	\$9,616.69	\$9,641.47	-24.79	38.71
Mutual Funds	\$2.22	\$2.22	--	0.01
<b>Totals w/o Accrued Interest:</b>	<b>\$24,845.08</b>	<b>\$24,868.16</b>	<b>-23.09</b>	<b>100.00</b>
Accrued Interest	\$0.05	--	--	--
<b>Totals:</b>	<b>\$24,845.13</b>	--	--	--

#### Announcements

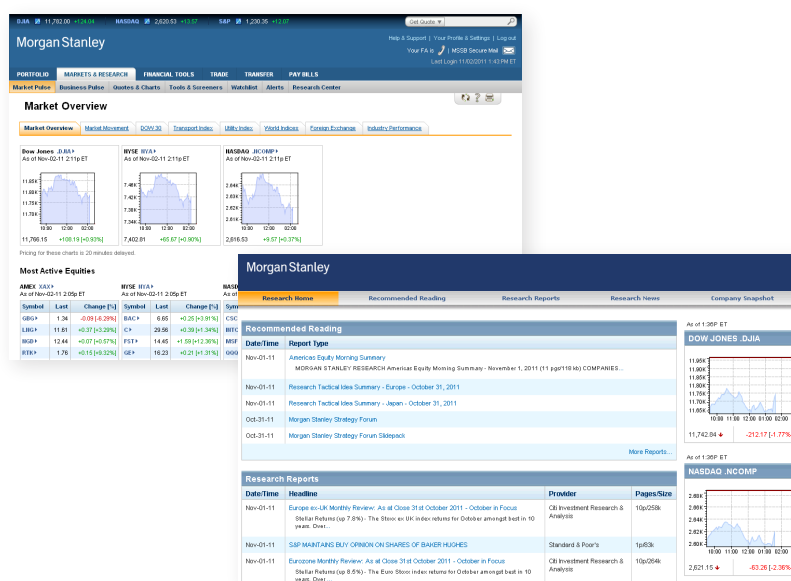
Access to Research Reports  
Resources & Support for Clients Impacted by Hurricane Sandy  
Reminder: Residual FMA Check & ACH Activity  
Changes to the Morgan Stanley Debit Card ATM Fee Policy

[More]

Explore exclusive benefits designed for our clients.  
[Learn More]

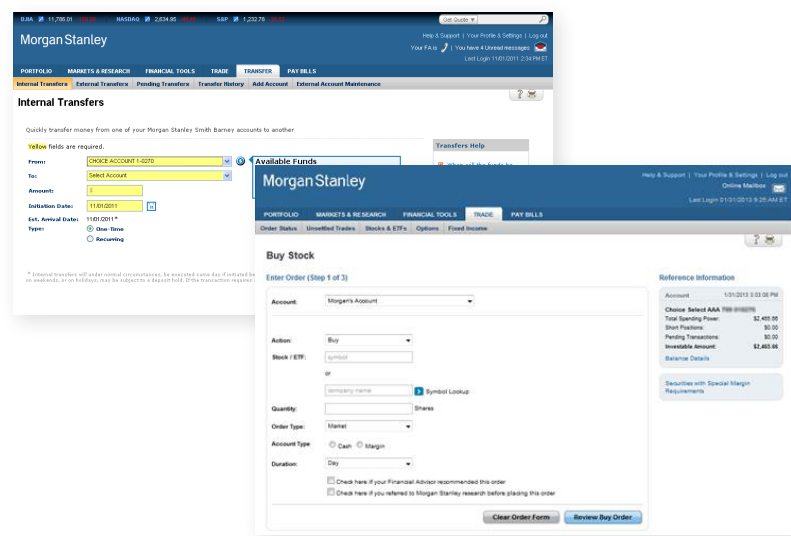
## STAY CURRENT WITH THE LATEST RESEARCH AND NEWS

- View and download research reports from Morgan Stanley, Citi Research, and Standard & Poor's
- Get quotes, charts, SEC filing documents, mutual fund prospectuses, and investment reports for most publicly traded companies
- Use Watchlist to track up to 250 securities you own or want to watch
- Create custom market data and news alerts delivered to your inbox, cell, or smartphone  
*Standard rates will apply.*
- Browse and search current market and business news and information, including a comprehensive selection of articles from Dow Jones News Service



## TRADE SECURITIES, TRANSFER FUNDS, AND PAY BILLS ONLINE (FOR ELIGIBLE ACCOUNTS)

- Trade stocks and some other security types online, manage your orders, and collaborate with your Financial Advisor on your investment goals
- Transfer money online between your Morgan Stanley accounts and your accounts at other financial institutions
- Pay bills online, schedule future payments, and view pending payments and balance information



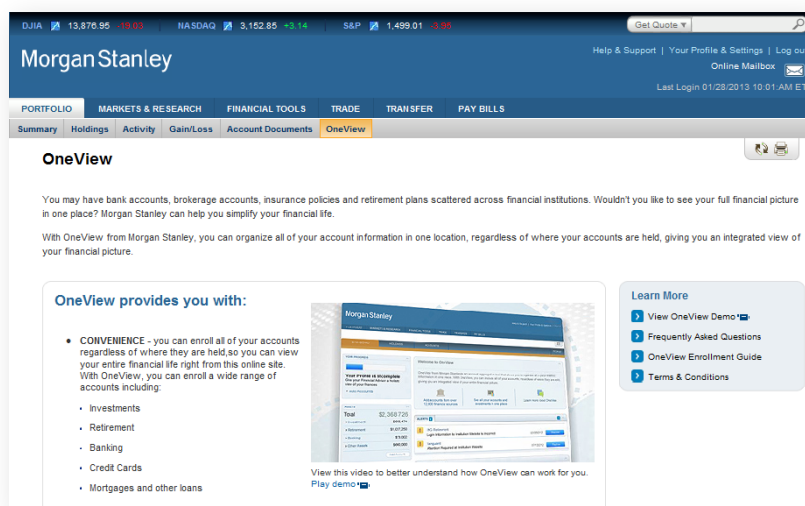
## GET EDELIVERY OF ACCOUNT DOCUMENTS INSTEAD OF PAPER DOCUMENTS BY MAIL

- Get your statements, tax forms, trade confirmations, and other important account documents online from one convenient place
- Receive an email notification when your online documents are available for viewing
- Reduce waste and clutter by no longer receiving paper documents by mail

The figure displays a screenshot of the Morgan Stanley website's eDelivery Settings page. The page shows options to enroll in eDelivery for all or selected documents, and lists the types of documents that will be enrolled.

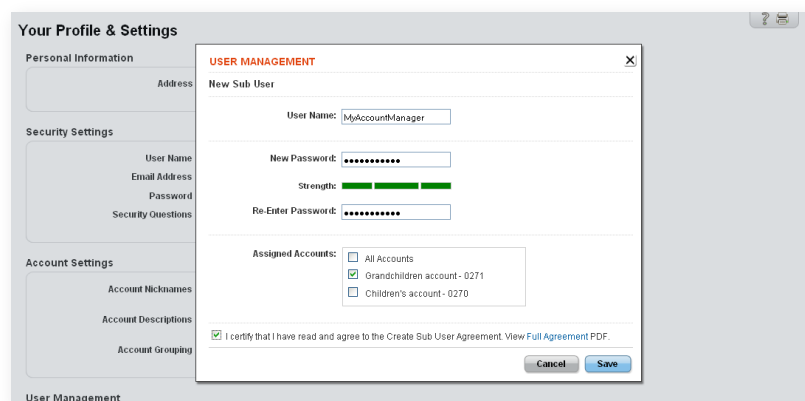
## SIMPLIFY YOUR FINANCIAL LIFE WITH ONEVIEW

- Organize all of your account information in one location, regardless of where your accounts are held
- Get a current, comprehensive understanding of your overall financial situation
- Automatically share your account data with your Financial Advisor



## GIVE FAMILY MEMBERS AND TRUSTED PROFESSIONALS ACCESS TO YOUR ACCOUNT

- Securely grant family members and trusted professionals access to view your accounts
- Access your accounts held at different branches with a single user name and password



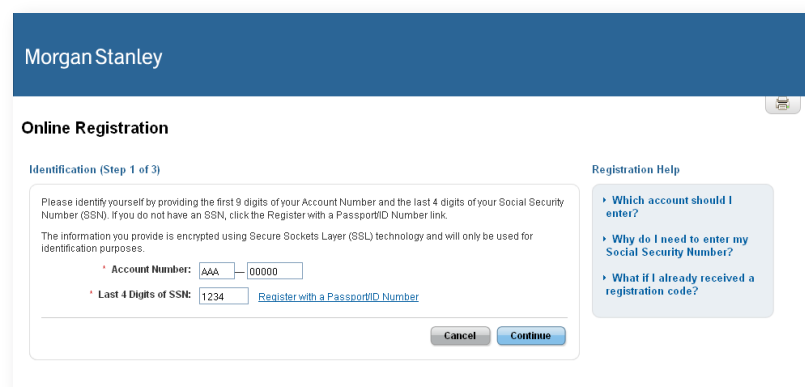
## HOW TO REGISTER

### CURRENT CLIENTS

If you are already a Morgan Stanley client, go to [www.morganstanley.com/online](http://www.morganstanley.com/online) and click “Register online to access your account” in the login box on the left. You will need your account number and the last 4 digits of your Social Security Number to get started.

### PROSPECTIVE CLIENTS

If you are not yet a Morgan Stanley client, learn more by talking to a Financial Advisor. Go to [www.morganstanley.com/online](http://www.morganstanley.com/online) and click “Find an Advisor/Branch” at the top of the page.



## ADDITIONAL HELP & SUPPORT

If you have any additional questions or need assistance, call the Client Interaction Center at 1 (888) 454-3965 (24 hours a day, 7 days a week). If you are outside of the United States, you can call collect at 1 (801) 617-9150.