

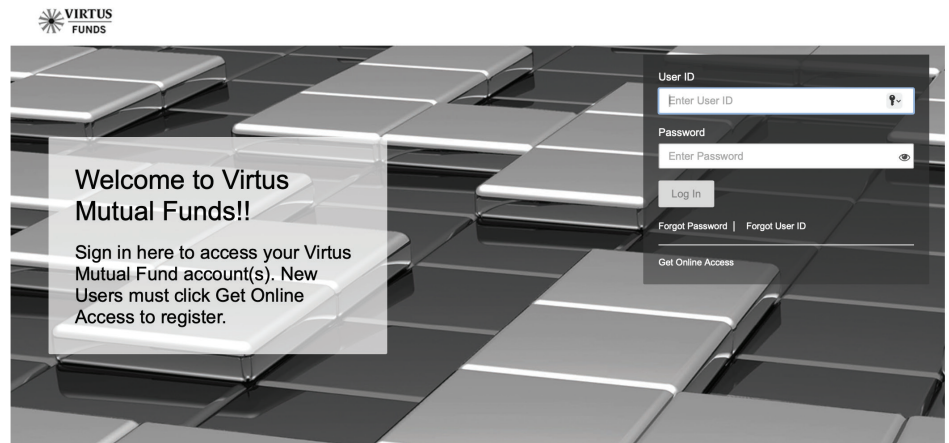
# GET ONLINE ACCESS USER REFERENCE GUIDE



www.virtus.com

## 1. Get Online Access

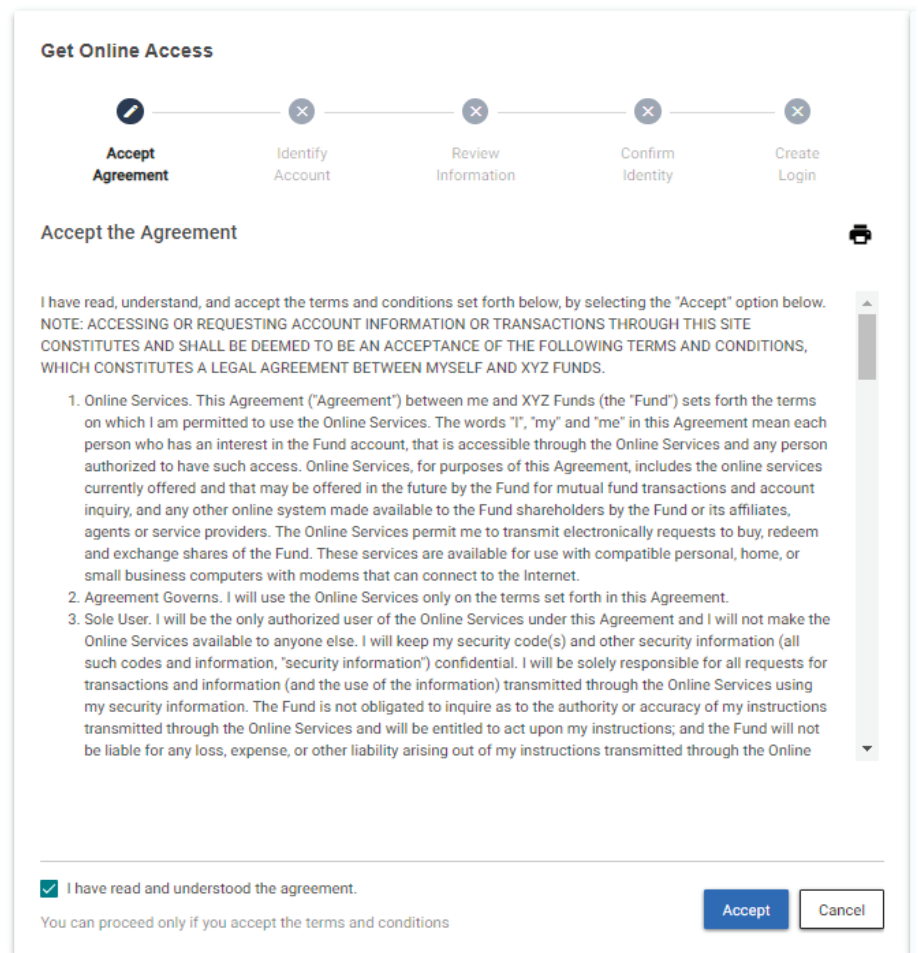
Log into the investor portal and click on "Get Online Access."



## 2. Accept the Agreement

On the **Accept the Agreement** page, check the "I have read and understood the agreement." box and select **Accept** to proceed to the next step.

Note: New users will see indicators at the top of the page change from grey to green as they move successfully through the process.



### 3. Identify Your Account

Next, the user completes the **Identify Your Account** page. Only one account associated with the Tax ID is required. The user completes the required fields by inputting:

- > First Name / Last Name
- > ID Type – select SSN or EIN from the pop-up bubble
- > SSN or EIN Number
- > Date of Birth
- > Account Number
- > Street Address, City, State, and Zip Code (Foreign address accounts, select any U.S. state and 00000 for the zip code.)
- > Primary Phone Number
- > Select Mobile or Other
- > Email address - used for occasional communications.

Click [Continue](#) to proceed to the next step or [Cancel](#) to return to the **Log In** page.

#### Get Online Access

✔  
 Accept Agreement

✎  
**Identify Account**

✕  
 Review Information

✕  
 Confirm Identity

✕  
 Create Login

#### Identify Your Account

To get online access, you must identify your account

First Name \*

Middle Initial

Last Name \*

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ID Type \*  
**SSN**

Number \*  
Number Required

Date of Birth \*  
eg. mm/dd/yyyy

---

Account Number \*

---

Street Address \*

---

eg. 123 Main St, Apt 2

City \*

State \*

Zip Code \*

---

eg. 08123

Country Code \*

Primary Phone Number \*

---

United States of Americ...

Mobile
  Other

Email \*

---

Email Required

Confirm Email \*

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An error message displays when the identifiers entered do not match existing records. Data may have been input incorrectly or further assistance may be required. A customer service representative can assist.

We are unable to find the account with the details you provided. Please check and try again. If you need further assistance, please speak with a Customer Service Representative. Close

✔

✎

✕

✕

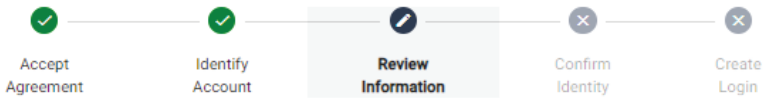
✕

✕

## 4. Review Information

Review the information. If any information requires editing, click on [Edit](#) in the bottom left or select [Continue](#) to go to the next step.

**Get Online Access**



**Review Your Information**

Please confirm that your information is correct.

**Profile**

First Name : L\*\*\*\*T

Last Name : W\*\*\*\*N

Email Address : a\*\*\*\*\*@b\*\*\*\*\*n.com

Primary Phone Number : 6\*\*\*\*\*4

Date of Birth : 1\*/\*\*/1\*\*1

Zipcode : 9\*\*\*7

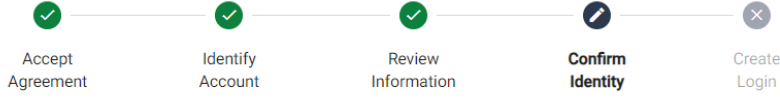
## 5. Confirm Your Identity

> Select mode to receive the one-time pass code (OTP).

> Click [Confirm](#)

\*If the user does not have access to the device to receive the OTP, the user will be returned to **Review Your Information** as we are unable to verify your identity.

**Get Online Access**



**Confirm Your Identity**

We need to confirm your identity before allowing you to continue.

One Time Passcode

A one-time passcode will be sent to you for verification

Text on 6467824614  
 Call on 6467824614. Please note: call will come from 561-962-9748 (Lexis Nexis)  
 I do not have access to 6467824614. Use an alternate verification method.

## 5. Confirm Your Identity (continued)

If the phone number entered is not able to be verified, the user will be provided with a masked phone number associated with the profile.

- > Enter the full number to proceed with verification.

**Get Online Access**

✔  
 Accept Agreement

✔  
 Identify Account

✔  
 Review Information

✎  
**Confirm Identity**

✕  
 Create Login

**Confirm Your Identity**

We need to confirm your identity before allowing you to continue.

Our records have found a different phone number 5\*\*\*\*\*34 associated with your profile.  
 Enter the full number to proceed with verification

Type the full number \*  
 (508)555-1234

---

Confirm

Continue

Cancel

Enter the OTP, click [Confirm](#), select [Continue](#) to go to the next step.

**Get Online Access**

✔  
 Accept Agreement

✔  
 Identify Account

✔  
 Review Information

✎  
**Confirm Identity**

✕  
 Create Login

**Confirm Your Identity**

We need to confirm your identity before allowing you to continue.

One Time Passcode

Enter the one-time passcode below to proceed.

Enter OTP \* 👁

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If you did not receive the One-Time Passcode, use the Resend OTP button to obtain a new passcode.

Resend OTP

Confirm

Continue

Cancel

## 6. Create Your Login

The final step is to **Create Your Login**.

Create your own User ID and Password, adhering to the parameters provided.

The requirements change from grey to green as accepted entries are made.

To change information on this page prior to clicking [Submit](#):

- > User ID
  - remove all entries and re-enter
- > Password
  - remove the password entries, re-enter, and verify

Click [Submit](#) to complete the **Get Online Access** process.

**Get Online Access**

Accept Agreement Identify Account Review Information Confirm Identity **Create Login**

**Create Your Login**  
Please create a User ID and Password for accessing the system.

**User ID \***  
User ID Required

- ✗ Between 8-36 characters
- ✗ Can only contain these special characters: - \_ @

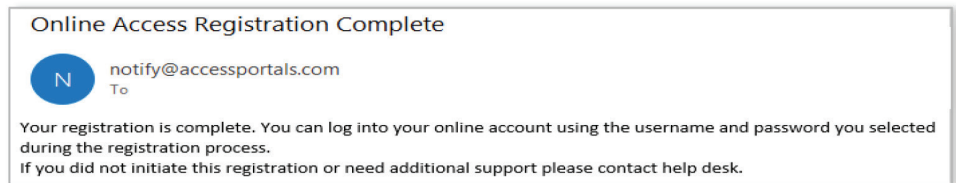
**Password \***  
Minimum 8 Characters

- ✗ At least 8 characters long
- ✗ Uppercase (A-Z) character
- ✗ Lowercase (a-z) character
- ✗ Numeric (0-9) character
- ✗ Special character
- ✗ Password and Confirm Password fields must match

**Verify Password \***

Submit Cancel

Shortly after completing the process, you will receive notification via email confirming successful registration.



You will be returned to the **Log In** page and need to proceed through the login process to access your online account.

