

# Enhanced Wealth Reporting Client Access Instructions



Clients of GSB Investments & Insurance may access their consolidated account information 24/7 through the Osaic Institutions Statements web portal.

## First-Time Login Instructions

1. Contact Josh Mozeleski or Liz O'Connell for a temporary password by calling (413) 775-8230
2. Go to [www.mainaccount.com/osaicinstitutions](http://www.mainaccount.com/osaicinstitutions)
3. Click on **Register Now** at the bottom right-hand corner of the log on box
4. Enter your Social Security Number and the temporary password you received from Josh or Liz
5. Read the User Agreement, then click **Accept** to agree to the terms
6. Enter your User Name, create a Password, and provide the requested personal information
7. Click **Next** to continue
8. Review and approve the Registration Confirmation screen, or go back and make any necessary adjustments

Once the Registration Confirmation screen has been approved, your online account request will be sent to the GSB Investments & Insurance team for approval. Approval will typically be granted within 1–2 business days. If you do not receive an email notifying you that your account has been activated after two business days, please call us at (413) 775-8230.

### Need Assistance?

Please contact the Osaic Institutions customer support team at (800) 218-2827 should you have any difficulties registering or Josh and Liz at (413) 775-8230 during regular business hours.

Investment and insurance products and services are offered through Osaic Institutions, Inc. Member FINRA/SIPC. GSB Investments & Insurance is a trade name of Greenfield Savings Bank. Osaic Institutions and the bank are not affiliated. Products and services made available through Osaic Institutions are not insured by the FDIC or any other agency of the United States and are not deposits or obligations of nor guaranteed or insured by any bank or bank affiliate. These products are subject to investment risk, including the possible loss of value.

## 24/7 Online Access

Osaic Institutions Statements allow you to easily consolidate and organize your investment accounts and generate in-depth reports. It is designed to increase your productivity while enriching the financial planning process.

Access your accounts any time, from any where in the world using the secure web site.

Once you've completed the registration process, just visit

[www.mainaccount.com/osaicinstitutions](http://www.mainaccount.com/osaicinstitutions)

for 24/7 access to your online accounts.

## Online Features

### Reports

Generate real-time reports, including up-to-the-minute market value of your accounts.

### Account Overview

Use the dashboard to see all of your accounts at a glance.

### Single Point of Access

Save time by viewing all of your investments, no matter which fund or investment company holds the account.

### Account Statements

Print, download, or export statements.

Not a deposit | Not FDIC Insured  
Not insured by any federal government agency  
Not guaranteed by the bank  
May go down in value