

DATE: Thursday, July 18, 2024

FROM: Equity Advisor Solutions

**SUBJECT LINE: Introducing Accelerayte: Your New Technology Platform as you Transition to ETC Brokerage Services**

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Dear Valued Advisor,

We are excited to introduce you to our new technology platform, Accelerayte. As we move forward with the transition of your investors' accounts from Equity Trust Company and Axos Clearing LLC ("Axos") to ETCB on July 27, 2024, you will start to use Accelerayte on July 29, 2024, as your Single Sign-On (SSO) to access all the technology solutions available to you as an advisor with Equity Advisor Solutions (EAS).

We want to ensure you have the resources you need to learn about Accelerayte, as well as answer some expected questions. Please take a few minutes to read through the below FAQ to ensure you are ready to conduct business via the new platform on Monday, July 29.

#### **Frequently Asked Questions (FAQs)**

##### **Who is Innovayte?**

- Innovayte is an evolution of EAS and ETCB businesses into a new, modernized offering for independent advisors and broker dealer representatives. Last fall there was a press release on the launch of Innovayte. Equity Advisor Solutions (EAS) is using Innovayte's technology platform called Accelerayte. As part of this conversion on July 27, you will now use Accelerayte to access all your applications available to you as an advisor with EAS.

##### **What is Accelerayte?**

- Accelerayte (by Innovayte) is a new technology platform that serves as a Single Sign-On (SSO) to access all your applications available to you as an advisor with EAS. This is an advisor-only facing technology and will not be accessed by your end-investor clients.

**How will I log in to Accelerayte?**

- On the morning of Monday, July 29, you will be emailed your Accelerayte credentials to start using the platform. The email will contain your username and a password. We will also be providing training resources including videos and guides to assist in your transition to the new platform.

**How will I log in to various systems including Orion and WealthStation?**

- You will use Accelerayte to log-on via a Single Sign-On (SSO) to access all your applications, including Orion and WealthStation, available to you as an advisor with EAS. Your credentials will be distributed on Monday, July 29, 2024, prior to market open.

**Can I log-in to WealthStation without going through Accelerayte?**

- For your convenience and ease of access, you will use Accelerayte for a Single Sign-On (SSO) experience to access all your applications available to you as an advisor with EAS. Your credentials will be distributed on Monday, July 29, 2024, prior to market open.

**Will I continue to log into the same Orion application with our current user IDs to access our book of business?**

- While your Orion log in will not change, you will get a new Accelerayte log on to be able to access Orion and WealthStation via a Single Sign-On (SSO). Your credentials will be distributed on Monday, July 29, 2024, prior to market open.

**How will I learn more about the new Accelerayte platform?**

- We will be providing a training video and a user guide on Accelerayte as we get closer to the launch date of July 29. In addition, we will be holding open “office hours” the week of July 29 for advisors to call in and ask support questions. We will notify you once those hours have been scheduled and provide you the information needed to join the calls.

**WealthStation Training Videos**

As a reminder, on-demand training videos for WealthStation are available to you on topics including:

- WealthStation Account Groups, Trade Solicitation Settings & Account Nicknames
- WealthStation Account Information
- WealthStation Order Entry
- WealthStation Dashboard
- End Investor

Please visit the [ETCB Advisor Conversion website](#) to view the on-demand training videos, as well as the updated FAQ.

Should you have any questions, please reach out to your Relationship Manager.

Sincerely,  
Equity Advisor Solutions

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