Morgan Stanley

Registration Guide StockPlan Connect

Morgan Stanley's StockPlan Connect website allows you to access and manage your equity plans online. Follow the easy step-by-step instructions in this guide to register your account and start using StockPlan Connect today.

There are Five Steps in the Registration Process:



Starting at Step 2, a progress bar along the top of the page will help you keep track of where you are in the registration process.

What You Will Need to Register

• Registration Email

If your company provided us with your corporate email address, we will send you an email containing a customized link along with registration instructions.

Welcome Letter

Containing your temporary user name (provided via standard mail)

OR

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• Password Mailer

Containing your temporary password (mailed separately)

NOTE: Web browser supporting Cookies and Secure Sockets Layer (SSL) is required to access the website.

Supported Browsers

- IE 9 and above is recommended (IE 8 also supported)
- Chrome 18 and above
- Safari 5 and above
- Firefox 17 and above



Step 1: Validation

VALIDATION VIA REGISTRATION EMAIL

If you received a registration email, click on the link contained within the email. You will be directed to a validation page where you will verify your identity by providing the following information:

a. Enter your social security number, global ID, or personal unique ID

b. Enter your company stock symbol

 $\boldsymbol{\mathsf{c}}.$ Answer a validation question (i.e. birth date, hire date, etc.)

Continue to Step 2

From: stockplanconnect@morganstanley.com To Subject: Register Your Morgan Stanley StockPlan Account		NOTE: If you do not
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REQUEST A REGISTRATION EMAIL

If you do not have the registration email, or the registration link on the email has expired (the registration link is valid for 30 days), click on the "Request a Registration Email" link on the www.stockplanconnect.com login page.

You will be directed to the Request a Registration Email page and asked to identify yourself by providing the following information:

a. Enter your company stock symbol

b. Enter your social security number or global IDc. Enter the first three characters of your first name

If your answers match what we have on file, a new registration email will be sent to your company provided email address.

Continue to Step 2

<form>

VALIDATION VIA STANDARD MAIL

If you received your temporary credentials in the mail, begin by opening www.stockplanconnect.com in a web browser.

a. Enter your temporary 11-digit User Name in the User Name field (provided in Welcome Letter)

b. Enter your temporary 6-digit Password in the Password field (mailed separately)

c. Click Go

Continue to Step 2



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Step 2: New Credentials

All the steps on this page are required to register your account.

A. CREATE USER NAME & PASSWORD

In this step you will create a new User Name and Password. These are the credentials you will use to access the website going forward.

1. Create a new User Name in the New User Name field, following the standards as defined below:

- Must be between 6 and 20 characters
- Can consist of lower case and upper case characters
- Can contain the following symbols: period (.), underscore (_), and hyphen (-)
- Cannot contain 2 consecutive special characters
- Cannot begin with a special character*

NOTE: Your User Name must be unique (i.e. it cannot already be in use by another person) and must comply with Morgan Stanley security standards.

2. Create and enter a new Password in the New Password field, following the standards as defined below:

- Must be between 8 and 20 characters
- Must have at least one numeric and one letter
- Can contain all special characters except <and>*
- Cannot contain blank spaces
- Cannot contain letters that do not form part of the English alphabet and diacritics including accents and tildes

3. Re-enter the new Password you just created in the New Password field. Passwords must match to proceed. A check mark will appear when the valid Password is re-entered.

* A special character is defined as a character that is not a letter, number, symbol, or punctuation mark defined by the English Alphabet.

NOTE: Passwords are case sensitive and must comply with Morgan Stanley complexity standards. The strength of the Password is measured by the "Password Strength" bar. A strong Password may provide greater security to your account.



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B. CREATE A VOICE PIN

This is used for verification when accessing account information or performing transactions over the phone. It should contain four digits.

C. CREATE SECURITY QUESTIONS

Choose three (3) security questions and type your answer to the question into the blank field next to it. These questions are used to verify your identity if we detect unusual activity on your account or require a second level of identity verification. Therefore, it is important to remember the answers you create for these questions.

NOTE: If you would like to receive these notifications to your personal email address as well, you can make that election in the Profile screen once your registration is complete.



D. READ AND ACCEPT THE TERMS AND CONDITIONS

Click on the link to open and read the registration "Terms and Conditions" that govern the use of the website. After reviewing the PDF, you must consent that you have read and agree by checking the box provided.

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Step 3: Contact and Settings

A. ENTER CONTACT DETAILS

You must enter at least one phone number where we can contact you in the event we have questions about your account or any related activity.

- **1.** Choose the country for the phone number from the drop-down
- 2. Select a type
- **3.** Enter the phone number in the text box
- 4. Enter your personal email address (optional)

B. SET LANGUAGE AND CURRENCY

Personalize your experience on Stock Plan Connect by selecting your preferred language and currency. You can change your selection at any time using the drop-down menus in the global navigation at the top of every page. Your selection will automatically save between sessions.

C. EDELIVERY

If you prefer to have your account documents posted to the website instead of receiving them in the mail:

- Click the check box. A list of eligible documents can be found by clicking on the link "Which documents are eligible?"
- 2. Read and agree to the Terms and Conditions
- 3. Click the Next Step button

NOTE: Once registration is complete, you can go to the Profile > eDelivery page to choose the email address(es) where eDelivery notifications should be sent. Notifications are sent when a new document is posted on StockPlan Connect.



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User Name	Participants	Registration Guide 0
Password		View step-by-step, easy-to
Voice PIN		your account.
Security Questions 1	What was the name of your first pet?	Download PDF
Security Questions 2	What was your favorite TV show as a child?	
Security Questions 3	What is the name of your best friend from high school?	
Home Phone	(555)555-1212	
Work Phone	(655)565-3434	
Personal Email	participant@anymail.com	
Language	English	
Currency	USD - U.S. Dollar	
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Step 4: Confirmation

Congratulations! You have completed the registration process. This page provides you with a summary of the information you entered. For security purposes, your password, voice pin and security question responses are masked.



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All participants sho additional 28% tax	uld have a certified W-9 (US withholding	i) or W-88EN (International)	from on file, in order to avoid an	Registration Guide View step-by-step, easy-to use instructions to register your account.



For more information on StockPlan Connect, please visit the **Knowledge Center** (www.morganstanley.com/spc/knowledge).

Step 5: Tax Certification

Please take a few minutes to complete your Tax Certification by clicking on the Certify Now button, which will launch a step-by-step process. This step is essential to avoid additional tax withholding when you complete a transaction on the web.

If you opt to complete your tax certification later, you will be taken directly to the Overview page in StockPlan Connect.



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