



PURCELL

Advisory Services, LLC

Clients Accessing Accounts Directly at the Custodian

Rydex|SGI – www.rydex-sgi.com – (800) 487-9339

- Click on “Establish Online Account Access” under the “Login to Your Account” section
- Choose “I am an Individual Investor or Financial Professional and I would like to set up a password for an Individual Account”
- Rydex Online Trading Disclosure – Accept
- Account Password Setup

User id: *(You may choose your account # or something personal)*

Account Number:

Email:

Social Security or Tax ID Number: *(No dashes)*

Password: *(One that you want to use)**

Confirm Password: *(Type in the same password as above)**

*Your password must contain a minimum of 5 characters and a maximum of 10 characters. It must also contain at least one capital letter and one number.

*Rydex|SGI account passwords are case sensitive.

Trust Company of America (TCA) –

<https://www.trustamerica.com/liberty/desktop/login.jsf?lf=pas>

- **Username:** *(Your account number)*
- **Password:** *(Social Security or Tax ID Number)*
- Click “Submit”
- Follow instructions on the next screen to change your password

Variable Annuity Company websites

You will need to contact them directly

- Jefferson National – <http://www.jeffnat.com> – (866) 667-0564
- Nationwide – <http://www.nationwide.com> – (866) 233-3223
- Security Benefit – <http://www.securitybenefit.com> – (800) 888-2461

All links are available on our website, www.purcelladvisory.com