



# **Morgan Stanley at Work Stock Plan Account Activation (Single Sign-On)**

For U.S. and Non-U.S. Participants

This guide will help you activate your Morgan Stanley at Work stock plan account. Follow the step-by-step instructions to get started.

**NOTE:** You can activate your Morgan Stanley at Work stock plan account by using your company's single sign-on or clicking on the activation link sent to your company email address, if available.

1. Before you can activate your account, you will need to go to your company's intranet and select the single sign-on (SSO) for your stock plan account. Once you click on the SSO you will be directed to the activation page where you will follow the steps below to complete activation for your stock plan account.

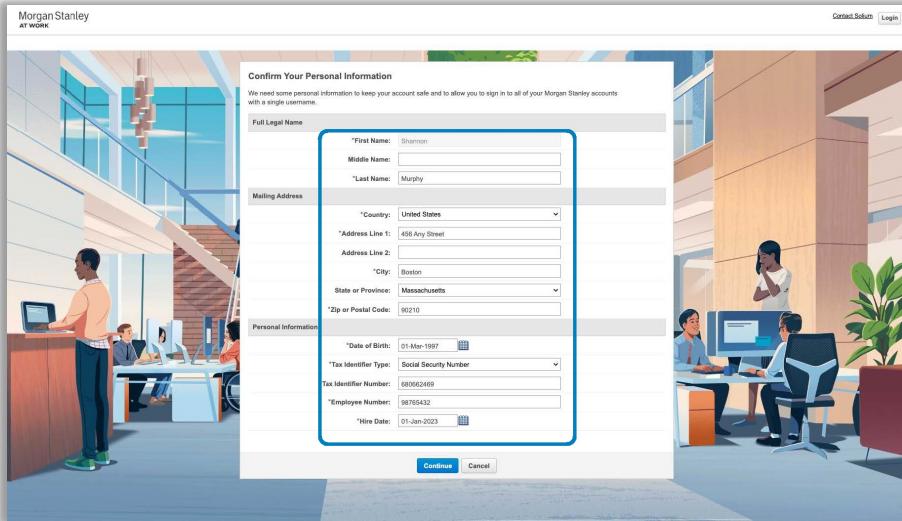
2. You will need to have the following information available to use as an identifier to complete the activation process.

For U.S. Participants	For Non-U.S. Participants
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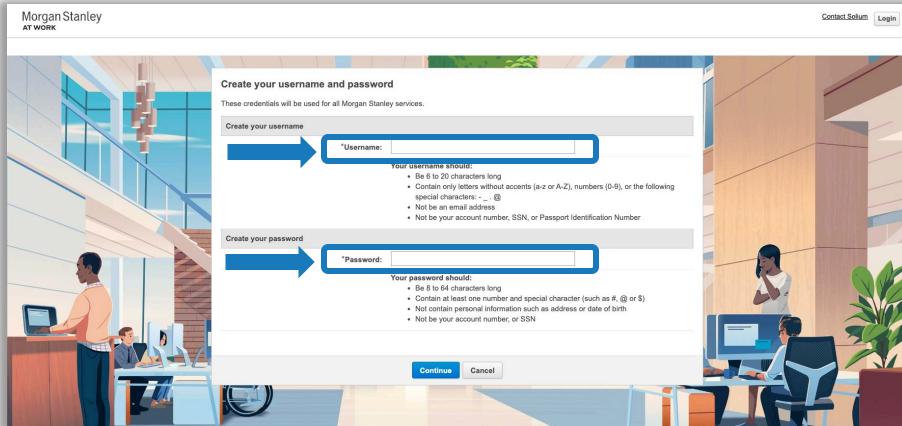
Date of birth	Date of birth
SSN	Employee #
Employee #	Hire date
Hire date	Last Name
Last name	Zip or Postal Code
Zip or Postal Code	

Enter the required identifying information. Full name and identifiers from above will be required.

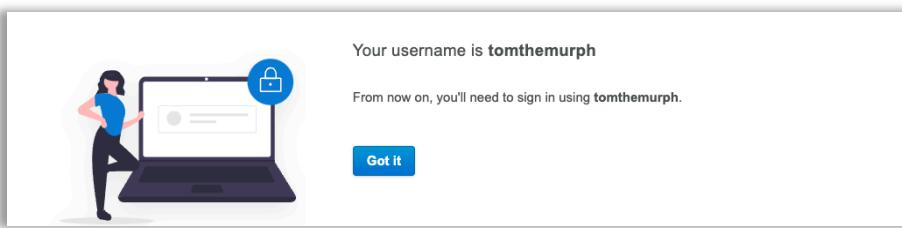
**NOTE:** Not all identifiers may be required based on the information your company has provided.



3. After your identity is verified, you'll be prompted to set up a **username, and password**.

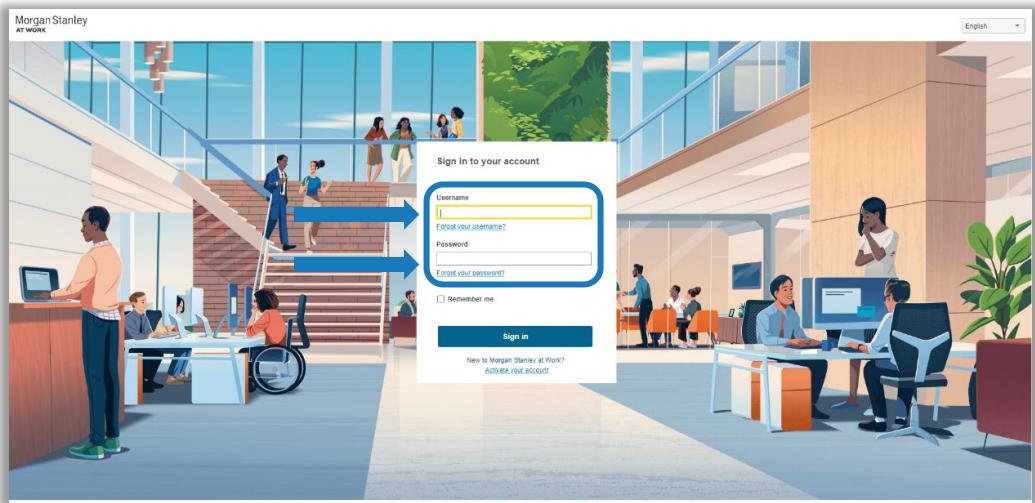


Once log-in credentials are established, immediate access to your account is provided.



4. How do I sign into my stock plan account?

You may access your stock plan account by going to: [atwork.morganstanley.com](http://atwork.morganstanley.com) and follow the sign -in instructions.



5. For the first time you sign in, you must first complete the account certification process and a few additional steps. Select if you are a **U.S Person or not a U.S. Person** and complete the certification steps.

A screenshot of a web page titled 'Morgan Stanley | Shareworks'. The page is titled 'U.S. Person Verification'. It contains a note about FATCA reporting and the definition of a US person. Below this, there is a list of three items: 'A citizen of the U.S. (including an individual born in the U.S., but resident in another country, who has not renounced their U.S. citizenship)', 'A permanent resident of the U.S.', and 'A person residing in the U.S.'. A yellow box highlights the radio button for 'I am not a "U.S. Person"'. A large blue arrow points to a 'Next' button, which is highlighted with a blue box.

6. Based on the question above you will either need to fill out an IRS Form W-9 or Form W-8BEN. Complete all the fields in the form that are applicable to you.

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**W-8BEN Form**

I AGREE to use Electronic Records and Signatures.

By checking the I agree to use Electronic Records and Signatures box and selecting "Next" you confirm that:

- I can access and have read the Electronic Record and Signature Disclosure Document;
- I can print on paper the Electronic Record and Signature Disclosure Document or save or send the disclosure document to a place where I can print it on paper, for future reference and access;
- I acknowledge that it is my obligation to notify Solum as soon as reasonably possible if there is a change in my email address or other location to which the electronic records may be provided;
- I consent to receive certain documents, disclosures and notifications through electronic means;
- If withdraw my consent, I acknowledge that it is my obligation to notify Solum as soon as reasonably possible of the address or other location to which paper records may be provided; and I consent to using electronic signatures and acknowledge my digital signature.

Note: If you are resident in a FATCA partner jurisdiction (i.e., a Model 1GA jurisdiction with reciprocity), certain tax account information may be provided to your jurisdiction of residence.

**Part I Identification of Beneficial Owner**

1 Name of individual who is the beneficial owner:  
VANDENBOSCH ABRAMSON

2 Country of citizenship:  
[dropdown]

3 Permanent residence address (street, apt, or suite no., or rural route):  
• Suite/Street: 248 Red St.  
• City: Timbuktu

4 Mailing address (if different from the residence address):  
• Suite/Street: 248 Red St.  
• City: Timbuktu

Province/State (Canada / Australia / Switzerland / Germany / Italy Only):  
[dropdown]

• Country: United Kingdom  
• Postcode: n/a

5 U.S. taxpayer identification number (SSN/TIN):  
[input]

6 Foreign tax identifying number:  
[input]

Exemption Reason:  
[dropdown]

7 Reference number(s) (Optional):  
[input]

8 Date of birth:  
DD-MMM-YYYY [input]

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**Part II Claim of Tax Treaty Benefits (for chapter 3 purposes only)**

9 I certify that the beneficial owner is a resident of  within the meaning of the income tax treaty between the United States and that country.

**Part III Certification**

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

1. I am the individual that is the beneficial owner (or am authorized to sign for the individual that is the beneficial owner) of all the income to which this form relates or am using this form to document myself as an individual that is an owner or account holder of a foreign financial institution;

2. The person named on line 1 of this form is not a U.S. person;

3. The income to which this form relates is:

- (a) not effectively connected with the conduct of a trade or business in the United States;
- (b) effectively connected but not subject to tax under an applicable income tax treaty, or
- (c) the partner's share of a partnership's effectively connected income;

4. The person named on line 1 of this form is a resident of the treaty country listed on line 9 of the form (if any) within the meaning of the income tax treaty between the United States and that country; and

5. For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.

Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner. I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.

**AFFIDAVIT OF UNCHANGED STATUS**

Under penalties of perjury, I further certify that: The certification, including the certification of foreign status of the beneficial owner and any claim of tax treaty benefits indicated on the Form W-8 to which this certification is attached, was effective since January 1 of the current year or to the date account was opened, whichever is earlier; and that status has remained the same and unchanged from that date until the date this new form is provided.

Agree to Certify Date: 25-Aug-2021  
[input]

Name of signer  
[input]

**ALTERNATIVE METHOD TO SUBMIT FORM:** If you feel the electronic form presented above is not applicable to you, you may download the appropriate form below and submit it to our Service Center.

Available options:

- Download W-8BEN form
- Download W-9 form
- Fill out W-9 form

**Next**

7. Next, you will be asked to accept the terms and conditions of your stock plan account. Click "I accept" to move to the next step.

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**Participant Terms and Conditions, Privacy Policy and eDelivery Consent**

We've updated our Terms and Conditions, Privacy Policy and eDelivery Consent. Please take a moment to review and accept the documents.

The following documents govern your use of the Morgan Stanley at Work website and the services provided. You may print or download each document and save it for your records.

Terms and Conditions	<a href="#">View document</a>
Privacy Policy	<a href="#">View document</a>
eDelivery Consent	<a href="#">View document</a>

I acknowledge that I have read and understood the Morgan Stanley at Work Privacy Policy and the access to and use of my information as provided therein.  
[Download all](#)

By clicking on "I accept":

- I confirm that I have received, reviewed, and understood the Terms and Conditions and associated documents listed above.
- I confirm that I have read and understood Section 30 of the Terms and Conditions which sets out the dispute resolution forum that applies to me, including any applicability of the arbitration agreements set forth in Parts A and B of the Terms and Conditions.
- I confirm that I have read and understood the applicability and scope of the eDelivery Consent, including Section 2 which sets out how to withdraw a given consent.
- I acknowledge that I have read and understood the Morgan Stanley at Work Privacy Policy and the access to and use of my information as provided therein.
- I sign and agree to the terms of each document listed above.

**I accept** **do not accept**

8. If this is your first time signing in, you may also be asked to click "**I Accept The Agreement**" to acknowledge the agreement to market data display services.

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Additionally, you will be asked to confirm if you are a Professional Subscriber as defined on the screen. Complete that section and click “Save”.

**Professional Subscriber Status**

A Professional Subscriber shall mean a natural person who is:

- a. a securities professional;
- b. not acting in their personal capacity and is acting as a principal, officer, partner, employee or agent of any business or on behalf of any individual;
- c. a broker, dealer, investment advisor or person otherwise employed by an organization conducting professional activities involving the buying and selling of instruments, such as stocks, bonds, options, futures contracts and other trading vehicles;
- d. engaged as a consultant, independent contractor, software developer or other such role that uses market information for any purpose for profit other than the trading of that person's personal account; or
- e. otherwise employed by a bank or other organization exempt from registration under United States Federal and/or state securities laws to perform functions that would require them to be so registered or qualified if they were to perform such functions for an organization.

For greater certainty, a Professional Subscriber is a natural person who is registered or qualified with:

- a. a Member Firm of the Investment Industry Regulatory Organization of Canada or an individual who resides with a person registered or qualified with a Member Firm;
- b. Securities Exchange Commission;
- c. Commodities Futures Trading Commission;
- d. any provincial, state or other government securities agency;
- e. any securities exchange or association;
- f. any commodities or futures contract market or association or other entity that performs functions that are equivalent to those of such Persons.

I am a "Professional Subscriber"  
 I am not a "Professional Subscriber"

**ACCEPTED AND AGREED:** I, the "Subscriber" to which the preceding terms and conditions refer, acknowledge that I have read the preceding terms and conditions of this Section, that I understand them and that I hereby manifest my assent to, and my agreement to comply with, those terms and conditions by "clicking" on the following button:

Save
Cancel

## 9. Your account setup is complete!

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Dashboard Portfolio Activity Documents

Thomas



Total portfolio value  
**\$759.00**  
[Interactive portfolio chart >](#)

● Unavailable **\$759**

## Welcome back, Thomas.

You signed in at 9:58 AM earlier today.

**Tasks**

You have no tasks right now.

● Available

Here's a summary of your available value.

Available value <b>\$0.00</b>	You currently have no available value, but as soon as you do, the details will appear here.
----------------------------------	---

● Unavailable

Here's a summary of your unavailable value.

Unavailable value <b>\$759.00</b>	Options (NQ) <b>\$759.00</b> 100 Options (NQ)
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**COST**  
Delayed 15 mins **\$487.59**  
-17 (0.34%)

**Get in touch**

**Upcoming events**

**UP NEXT**

- VEST Options (NQ) 25 options will vest February 1, 2024
- VEST Options (NQ) 25 options will vest February 1, 2025
- VEST Options (NQ) 25 options will vest February 1, 2026

Currently showing the next few events. View the full schedule on the [Portfolio tab](#).

**Past events**

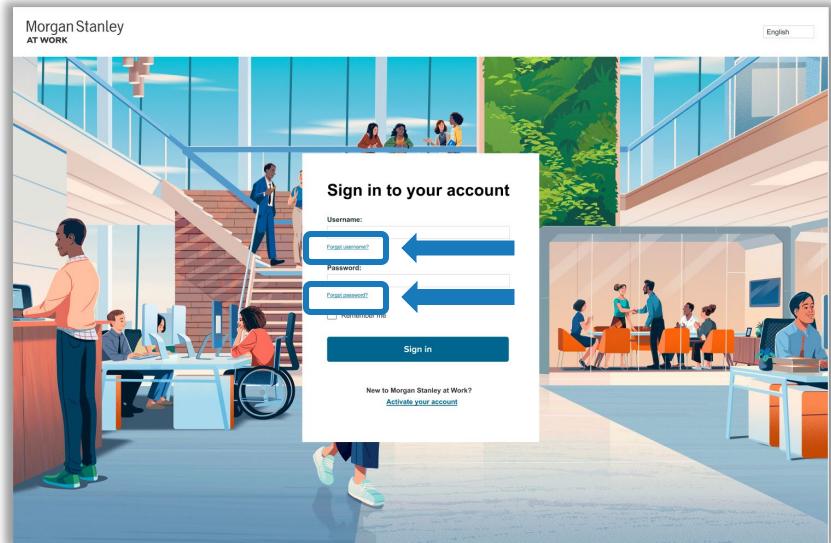
**MOST RECENT**

- GRANT Options (NQ) February 1, 2023  
You were granted 100 options at a price of \$480.00

# How to Reset Username or Password

## I forgot my account password, what do I do?

You can reset your password online. Simply click [the Forgot Your Password link](#) on the login page and complete the required steps. You will need your username and e-mail to reset your password.

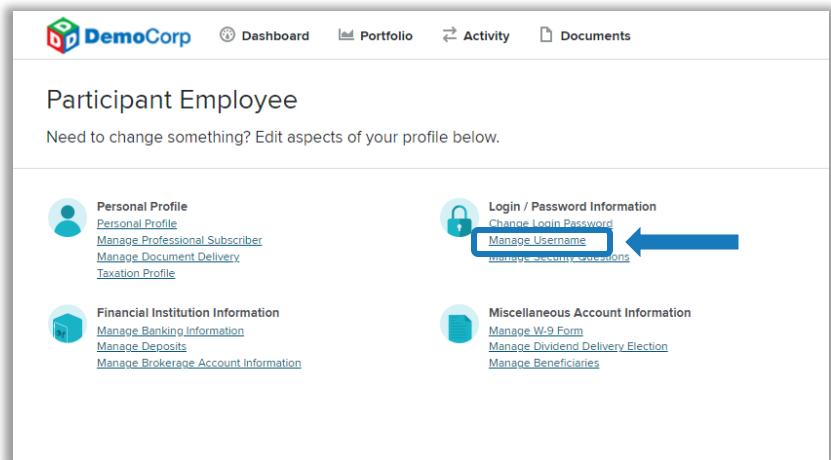


## I forgot my account username, what do I do?

You can reset your username online. Simply click [the Forgot Your Username link](#) on the login page and complete the required steps. You will need your e-mail and employee number to reset your username.

## How can I change my username?

You can edit your username by clicking on your **Profile** once you are logged in. Click on **Manage Username** under the "Login/Password Information" section of your Profile. Once you edit your username click **Save**.



## Have Questions?

Call

### Toll-Free: Hours:

[+1 866 722 7310](tel:+18667227310)

Monday to Friday - 8:00 a.m. to 8:00 p.m. EST

### Toll Line: Hours:

[+1 801 617 7435](tel:+18016177435)

Monday to Friday - 8:00 a.m. to 8:00 p.m. EST

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