



T.RowePrice

SSAnalyzer™ Steps to Register & Import Clients

How to create a new account with secure registration

1. Go to T. Rowe Price's [SSAnalyzer Landing](#) page.
 - Click on the link to Register or Access Now
 - Log in with the business email address used with your old SSAnalyzer account
 - Click Continue
 - You should then be directed to verify your email address. If not – please register with your company email, first and last name, and company name before proceeding to our secure registration.

2. You will receive an authentication code to verify your email.
 - Enter Verification Code and click **Verify**.
 - Create a Username
 - Must be at least 6 characters
 - Must not contain special characters
 - Must not be an email address

3. Create Password
 - Between 8-32 characters
 - Contain at least 2 letters
 - Contain at least 2 numbers

How to create a new account with secure registration (continued)

Be sure your answers are easy to remember and difficult for others to guess. Answers are not case sensitive and must be **3 to 20 characters**, including spaces.

Tips for answering questions:

- Use one word answers: avoid words such as "last," "the," etc.
- Follow the recommended format: for example, if your security question is "What is your mother's date of birth?" use the preferred format (MM/DD).
- Avoid odd answers: you may not remember them in the future.
- Note the key words: If your security question is "What is your father's middle name?" do not enter "Jason Thompson".
- Be careful with spaces; for example, if you enter "New York" as one of your answers the system will reject "NewYork".

First Security Question

Select Question...

Enter your answer

Second Security Question

Select Question...

Enter your answer

Third Security Question

Select Question...

Enter your answer

Fourth Security Question

Select Question...

Enter your answer

Next

Need help?

Call us at 1-877-561-7670

Mon-Thurs 8am - 6pm ET Fri 8am - 5pm ET

Frequently Asked Questions

What is Multi-Factor Authentication?

How does this help secure my account?

How will this impact my log in experience?

What if I didn't receive the verification code?

4. Set up Security Questions

- Select from a list of questions
- Provide a response for validation

Set Up Multi-Factor Authentication

How would you like to receive your verification code?

The method you choose will be set as your communication preference for multi-factor authentication.

Authenticator App

Set up Authenticator App

Phone (text or automated voice call)*

Add Phone Number

* Automated Voice Calls - U.S. Phone Numbers Only

Back Next

Need help?

Call us at 1-877-561-7670 for help logging in.

Mon-Thurs 8am - 6pm ET Fri 8am - 5pm ET

Frequently Asked Questions

What is Multi-Factor Authentication?

How does this help secure my account?

How will this impact my log in experience?

What if I didn't receive the verification code?

5. Next, you will need to set up Multi-Factor Authentication. Select how you would like to be verified on sign in.

- Authenticator App – allows you to download an app to your phone to generate a code to be entered on sign in.
- Phone – receive a text or automated call

Set Up Multi-Factor Authentication

Add your phone number to receive a verification code.

Phone Number

+1

This phone number will be added for multi-factor authentication.

Contact information is kept separate from multi-factor authentication information.

Back Next

Need help?

Call us at 1-877-561-7670 for help logging in.

Mon-Thurs 8am - 6pm ET Fri 8am - 5pm ET

Frequently Asked Questions

What is Multi-Factor Authentication?

How does this help secure my account?

How will this impact my log in experience?

What if I didn't receive the verification code?

6. System will ask you for your email as the final verification.

How to create a new account with secure registration (continued)

Multi-Factor Authentication Preferences

Your Multi-Factor authentication method:

(*) (*) (*) -1673

Add Phone Number

Set up Authenticator App

Your Multi-Factor authentication frequency:

☐ **Always**
We will request a verification code every time you log in.

☒ **As Needed**
We will occasionally request a verification code for your added security.

Learn More About:

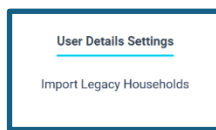
- What is Multi-Factor Authentication?
- How does this help secure my account?
- How will this impact my log in experience?
- What if I didn't receive the verification code?
- I have my method set as authenticator app, how do I switch to a different authenticator app?

7. Lastly, you can set your preferences for how often you will be verified through Multi-Factor Authentication.

- Select Always (Every time you log in)
- Select As Needed (On occasion for added security)

Once you have completed set up, you are all set to enjoy the benefits of secure access, including access to SSAnalyzer at no cost.

How to upload company logo for SSAnalyzer™ reports



1. Click on User Settings in the top right-hand corner.

User Details Settings

Use the fields below to update your user details.

First Name: Lisa, Last Name: Harris, Company Name: T. Rowe Price

Company Logo: No Company Logo, Upload Image

Update User Settings

2. Choose the User Details Settings tab.

- Update first name, last name, and company name as you would like to see them published on the reports generated from SSAnalyzer.

Upload Image

Image Purpose: Report Header Logo

Image may be no bigger than 80h x 350w pixels.

Click here to select a file to upload: SSA_LOGO.png

Only JPEG, PNG and SVG files are supported.

Description: Lisa Logo

Use this field to add a note.

Cancel Upload

3. Upload a company logo by clicking the blue “Upload Image” option.

- Leave the Image Purpose as “Report Header Logo”
- Select a file to upload. Only JPEG, PNG, and SVG files are supported
- Add a description (optional) of the logo file

How to import past client list from the original SSAnalyzer™ account to new account

1. Click on User Settings by selecting the Account dropdown in the top right-hand corner.



2. Choose the Import Legacy Households tab
 - a. Enter your Username and Password as used to log into the original tool at www.SSanalyzer.com
 - b. Click **Import Households** – if successful, all households from your client list will now appear in your client list.
 - c. You will only want to do this step one time, because it is a one-time action to copy all of your household details into your new client list.

Tips for import actions and troubleshooting:

- If the client list does not appear, you should receive an error message. This means your Username and Password did not match the original www.SSanalyzer.com account. You will need to return to the original tool and reset your password. If you need help with this step, please email help@socialsecuritysolutions.com.
- If you add more new clients to the original www.SSanalyzer.com account, they will not automatically appear in the new tool. This is not a live “syncing” type feature of data passing back and forth between the tools.
- You will want to wait until you are ready to move fully into the new tool to execute this import action.
- If you repeat this step, the software will execute the import action again, likely producing duplicate households in your client list.

Other issues or questions? Contact us.

Contact your sales partner by calling 1-800-564-6958 or emailing us at AdvisorServices@troweprice.com.

T. Rowe Price Investment Services, Inc.

© 2025 T. Rowe Price. All Rights Reserved. T. ROWE PRICE, INVEST WITH CONFIDENCE, and the Bighorn Sheep design are, collectively and/ or apart, trademarks of T. Rowe Price Group, Inc.

202505-4463597

FOR INVESTMENT PROFESSIONALS ONLY. NOT FOR FURTHER DISTRIBUTION.