Disabling WTP's Login Requirement

In certain trusted situations, an Administrator may want to disable WTP's login requirement. Disabling this function requires that various settings be enabled within the application.

Step One – Administrator must set login option for user:

1. Login to the program as an administrator.
2. Click on Administration and select Manage Users
3. Select Maintain User and highlight username in the box to the right
4. Under Login Options
    - Check to "Permit this user to store login information locally"
5. Click OK to update user's settings

Step Two – User must store information locally and set login option

1. Login to the program as the user
2. Click on Preferences
3. Under Individual Preferences, select Review Personal Information and provide the requested data. Click OK.
4. Select Review Security Preferences and check the box to "Store login information locally"

The next time the user launches the program, the user will **not** be prompted to login and the application will open up to the Wealth Transfer Planning Desktop.

NOTE: When users store login information locally, they can login automatically only from their own computers because the information is stored in the local registry.