

Online Access and Electronic Delivery Form

Financial Organization Name

You may use this form to:

- Create a User ID and temporary password for online access
- Link additional accounts to an existing User ID
- Provide instructions to establish electronic delivery (e-delivery) of brokerage account communications
- Change delivery instructions for accounts linked to an existing User ID

YOUR FINANCIAL ORGANIZATION WILL PROVIDE YOU WITH THE NAME OF THE WEBSITE THROUGH WHICH YOU WILL ACCESS YOUR ACCOUNTS.

STEP 1. ACCOUNT OWNER INFORMATION

Primary Account Owner Name	
Mother's Maiden Name	Account Owner's Date of Birth - -
Email address	
If You Have an Existing User ID, Please Provide it Here	

ALL FIELDS ARE REQUIRED.

ONE VALID EMAIL ADDRESS MUST BE PROVIDED FOR DELIVERY OF NOTIFICATION EMAILS.

NOTICES RELATED TO ONLINE ACTIVITY MAY BE SENT TO THIS EMAIL ADDRESS.

If you are requesting a new User ID, indicate your first and second choices below. User IDs must have a minimum of 7 and maximum of 15 characters, are NOT case sensitive, and should consist of letters and numbers only.

User ID Desired (first choice)	User ID Desired (second choice)
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STEP 2. ELECTRONIC DELIVERY PREFERENCES

Your account statements and the other documents below will be sent via electronic delivery (e-delivery) for all accounts linked to this user ID. This means that instead of receiving them on paper, you must access your documents online. You may update your preferences online, where you can also choose e-delivery for tax documents.¹ You must read and agree to the Electronic Delivery Agreement in Step 4 and sign in Step 5.

We will default to eDelivery of the following unless checked below:

- Paper account statements
- Paper account notifications²
- Paper trade confirmation/advices
- Paper Quarterly Performance Reports³

Proxy, Shareholder and Reorganization Materials delivery preferences

- Check this box to receive Proxy, Shareholder and Reorganization Material communications via e-delivery for the primary account. You must choose a four-digit PIN and write this number in the space provided below. You must read and agree to the Electronic Delivery Agreement in Step 4 and sign in Step 5.⁴

Four-Digit PIN

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¹ Tax documents are also available via electronic delivery; however, enrollment must be done online by the account owner. Please contact your financial organization for assistance.

² Please contact your financial organization for a list of the specific notifications eligible for electronic delivery.

³ Please contact your financial organization to confirm availability of Quarterly Performance Reports for your account(s).

⁴ A four-digit PIN is required for electronic delivery of proxy communications. For managed accounts, changes to delivery preferences for proxy and shareholder communications may need to be initiated by your advisor or money manager.



