AFS Financial Group Is Going Green!

Electronic Statements and Trade Confirmations Are Now Available

We're pleased to announce that you can now opt out of receiving paper statements and trade confirmations and view them online instead.

Why go Paperless?

- You won't have to file or shred your monthly statements or trade confirmations.
- You'll cut down on clutter – and save a few trees too!
- You will receive an e-mail notification as soon as your statement or trade confirmation is available, instead of having to wait for mail delivery.
- No more paper statements or trade confirmations sitting in your mailbox until you retrieve them. This can help reduce the risk of identity theft. Online statements are password protected and encrypted on Investor360°®, our online web portal for clients.
- Your electronic statements and trade confirmations are will be in PDF format so they can be saved and printed at any time.

It's Simple to Sign Up

To sign up for electronic delivery of statements and trade confirmations, you'll first need online access to your account through Investor360°.

Do you already have a Login ID and password for Investor360°?

If yes:

1. Log in to Investor 360° and go to the Administration tab and select **Preferences**.
2. For each account, **indicate the one e-mail address that should be used** when sending notification that a statement or confirm is available for online viewing. **Check the appropriate box(es)** to indicate whether you want to suppress paper for just statements, just confirms, or both.
3. Click **Save**, and read and accept the disclaimer that appears.

If no:

You can access Investor360° only after you have been assigned a Login ID and temporary password. If this will be your first time accessing Investor360°, please call Jason Dahl at 301-961-8408 or e-mail him at JasonD@afsfinancialgroup.com for this information. If you have forgotten your Login ID or password, Jason can also help you with this.

Frequently Asked Questions

1. **How soon after I enroll in electronic delivery will the changes take effect?**
   After you've completed these steps, your next paper statement will be your last. E-notifications will begin after the current statement cycle is complete.

2. **How will I know when my statements and trade confirmations are available?**
   You will receive an e-mail notifying you when your statement or trade confirmation is available on Investor360°.

3. **Are electronic statements different than my paper statements?**
   There is no difference between the information on the electronic and paper versions of your monthly statements or trade confirmations. The electronic statements and confirms are simply PDF versions of the paper statements and confirms.

4. **Are historical documents available?**
   Yes. You'll have access to seven years of monthly statements and twelve months of trade confirmations.

5. **Can I go back to paper delivery?**
   Yes, you can resume paper delivery at any time by logging on to Investor360°and changing your delivery preferences.

6. **Can I save the statements and trade confirmations on my PC?**
   Yes. As PDF files, your electronic statements and trade confirmations can easily be saved on your PC and printed by you.