

# The Reasons to Go Paperless Are Piling Up.

**See your statements and eligible account documents online in Investor360®.**

Eliminate the clutter associated with multiple account mailings, and simplify the way you're notified of account statements and eligible account documents. With Investor360®, you can:

- Get set up in just minutes
- Decide which accounts to include
- Receive notifications by e-mail when your online statements and eligible account documents are ready for viewing

**Scroll down to see just how easy it is to go paperless.**

## With Investor360°, eliminating paper takes just minutes.

Investor360°

Welcome John Smith

Settings **1** Print LOGOUT

GET A QUOTE: SYMBOL

SYMBOL LOOKUP

### Paperless Preferences

E-Delivery:  No e-Delivery  
 Some documents or some accounts

John Smith IRA NFS - (B37123456)

Deliver to: JOHN SMITH

**2**

Select All  
 Confirms  
 Customer Correspondence  
 Statements  
 Shareholder Reports

Janice Smith Roth IRA NFS - (B37111222)

Deliver to: JANICE SMITH

Email:

Select All  
 Confirms  
 Customer Correspondence  
 Statements  
 Shareholder Reports  
 Tax Documents **3**

CANCEL SAVE

Pct. Assets (%)

99.46
99.46
0.53
0.53
99.99

### Step 1

Go to the Settings page in Investor360° and scroll to the Paperless Preferences section.

### Step 2

For each account, select the account holder and enter an e-mail address for delivery. Check the box to indicate whether you would like to go paperless with any selected documents or all.

### Step 3

Click **Save**; then read and accept the disclaimer that appears, and you're done.



**Please note:** You can also begin this process by clicking on the Paperless Preferences link provided on your Statements page.

## Not signed up for Investor360°? Call us today to get started.