

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.