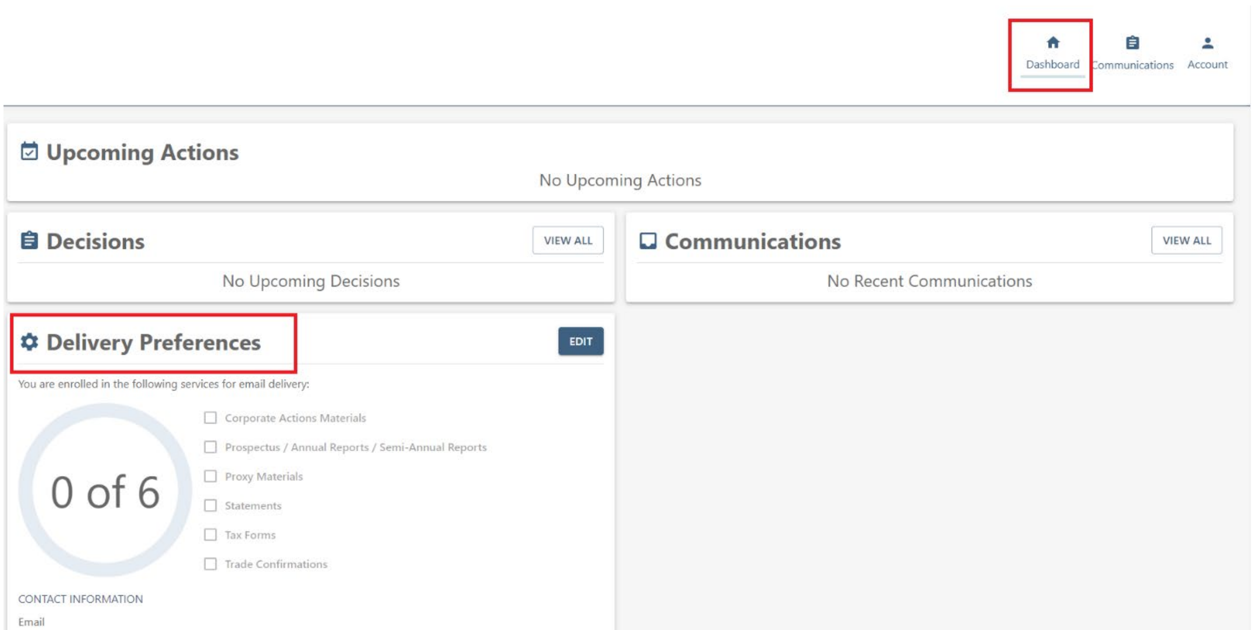
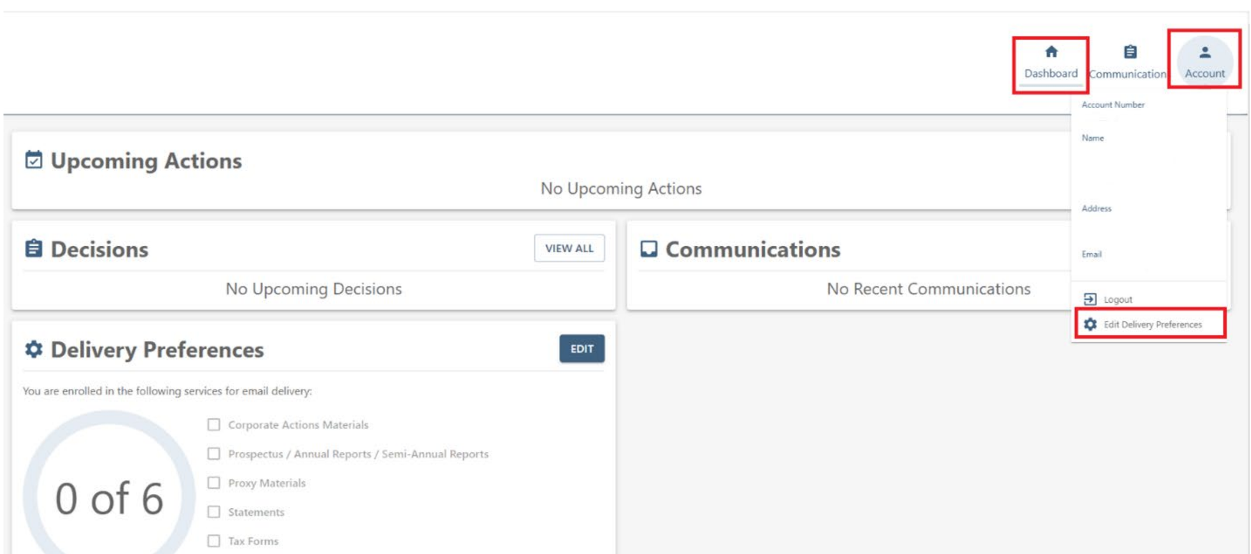
SWITCHING TO ELECTRONIC STATEMENTS

- **To opt out of paper statements and to opt in elected for e-delivery, they can opt via the “Dashboard” option via Investor Inbox.**
- **You will see 6 options available; at least 3 options must be selected for e-delivery to become effective.**
- **You can simply check the boxes and confirm your email address.**



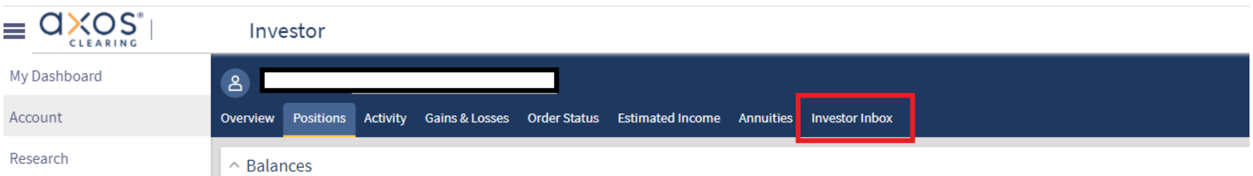
- **You can “edit delivery preferences” at anytime by simply using the “Account” option in the top-right corner.**



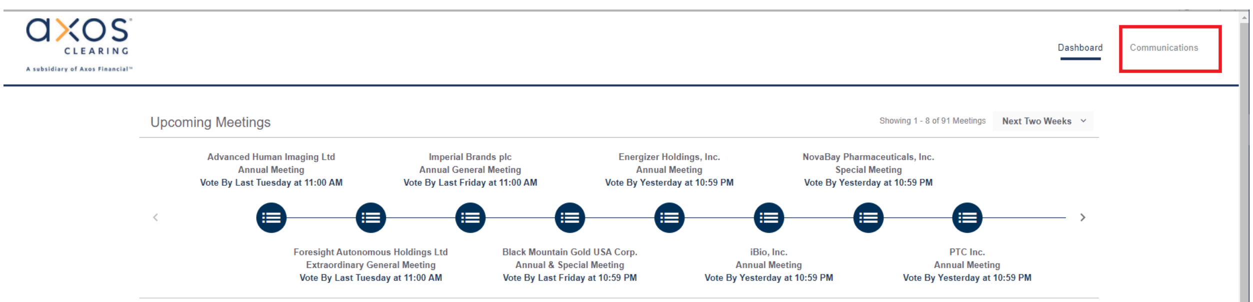
NAVIGATING TO STATEMENTS, CONFIRMS, AND TAX DOCS

- **Select "Account" from left navigation pane on main landing page**

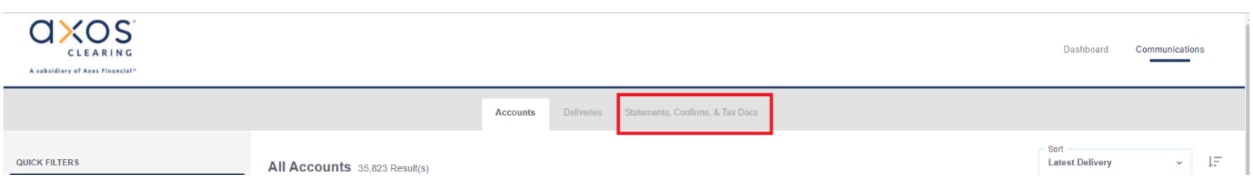
- **Use far right option on the blue panel for "Investor Inbox"**
- **NOTE: This will initiate an additional web page to be opened on the client's browser**



- **To locate/search Statements, Confirms, or Tax Documents, simply click the "Communications" option in the top right corner of main landing page.**



- **Select shaded tab for "Statements, Confirms, and Tax Docs"**



- **You will need to insert search parameters to locate specific required documents they may be seeking.**