

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.

The screenshot shows the top navigation bar with 'Dashboard', 'Communications', and 'Account' links. The 'Dashboard' link is highlighted with a red box. Below the navigation bar, there are three main sections: 'Upcoming Actions' (No Upcoming Actions), 'Decisions' (No Upcoming Decisions), and 'Communications' (No Recent Communications). The 'Delivery Preferences' section is highlighted with a red box and contains a circular progress indicator showing '0 of 6' and a list of six services for email delivery, each with an unchecked checkbox: Corporate Actions Materials, Prospectus / Annual Reports / Semi-Annual Reports, Proxy Materials, Statements, Tax Forms, and Trade Confirmations. Below the list is a 'CONTACT INFORMATION' section with an 'Email' field.

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

This screenshot is similar to the previous one but shows the 'Account' menu open in the top right corner. The 'Account' link in the navigation bar is highlighted with a red box. The dropdown menu is open, showing options for 'Account Number', 'Name', 'Address', 'Email', 'Logout', and 'Edit Delivery Preferences'. The 'Edit Delivery Preferences' option is highlighted with a red box. The rest of the dashboard content remains the same as in the previous screenshot.

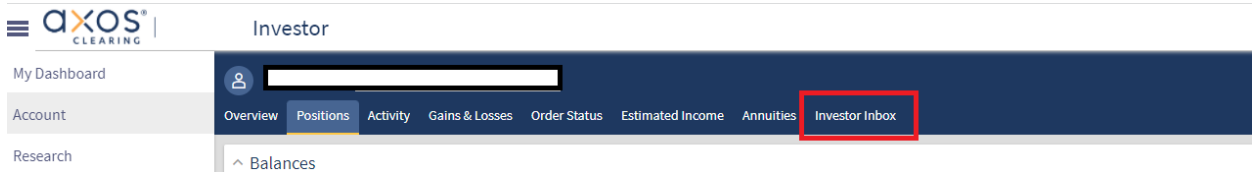
NAVIGATING TO STATEMENTS, CONFIRMS, AND TAX DOCS

✚ Select “Account” from left navigation pane on main landing page

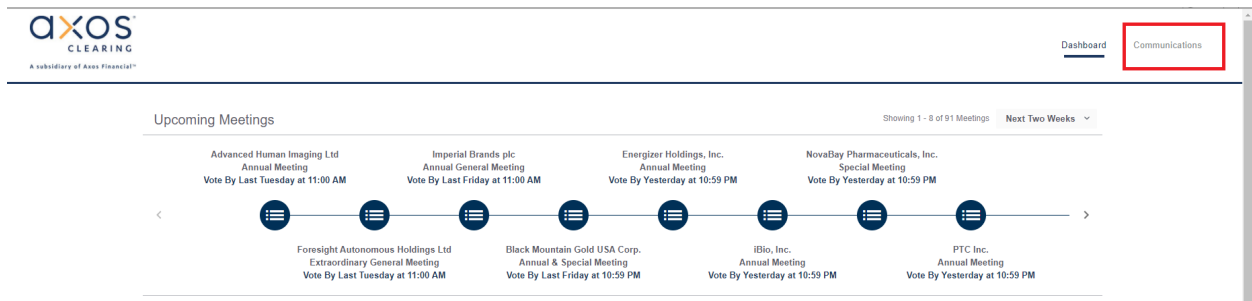


✚ Use far right option on the blue panel for “Investor Inbox”

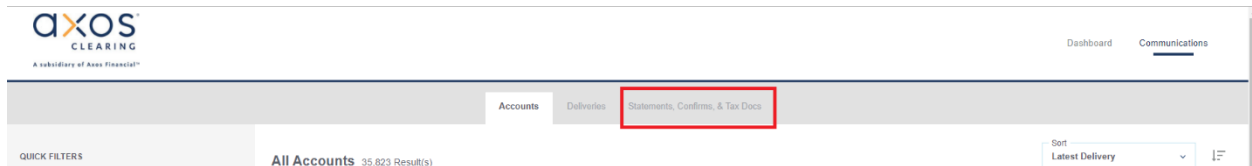
✚ **NOTE:** This will initiate an additional web page to be opened on the client’s browser



✚ 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.

