

# Online Access and Electronic Delivery Form

Financial Organization Name

You may use this form to:

- Create a User ID and temporary password for online access
- Link additional accounts to an existing User ID
- Provide instructions to establish electronic delivery (e-delivery) of brokerage account communications
- Change delivery instructions for accounts linked to an existing User ID

**YOUR FINANCIAL ORGANIZATION WILL PROVIDE YOU WITH THE NAME OF THE WEBSITE THROUGH WHICH YOU WILL ACCESS YOUR ACCOUNTS.**

## STEP 1. ACCOUNT OWNER INFORMATION

Primary Account Owner Name	
Mother's Maiden Name	Account Owner's Date of Birth
Email address	
If You Have an Existing User ID, Please Provide it Here	

**ALL FIELDS ARE REQUIRED.**

**ONE VALID EMAIL ADDRESS MUST BE PROVIDED FOR DELIVERY OF NOTIFICATION EMAILS.**

**NOTICES RELATED TO ONLINE ACTIVITY MAY BE SENT TO THIS EMAIL ADDRESS.**

If you are requesting a new User ID, indicate your first and second choices below. User IDs must have a minimum of 7 and maximum of 15 characters, are NOT case sensitive, and should consist of letters and numbers only.

User ID Desired (first choice)	User ID Desired (second choice)
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## STEP 2. ACCOUNT INFORMATION AND CONSENT TO ELECTRONIC DELIVERY

Please provide information regarding the accounts you wish to view online. When you elect to receive electronic delivery of brokerage account communications as outlined below, you will no longer receive paper copies via postal mail. If you elect to receive proxy communications via e-delivery, you must choose a four-digit PIN and write this number in the space provided below. You must read and agree to the Electronic Delivery Agreement in Step 3 and sign in Step 4.

**IF YOU ARE LINKING MORE THAN FIVE ACCOUNTS, PLEASE ATTACH ADDITIONAL ACCOUNT INFORMATION.**

For U.S. accounts, the Social Security number of the primary account holder listed in Section II must be affiliated, either as an account owner or participant, on the account numbers provided below. If the primary account holder above is not an owner on all accounts listed below, each account owner must sign in Step 4.

	ACCOUNT ACCESS ONLY	ELECTRONIC DELIVERY <sup>1</sup>				
	Link to Primary Account	Account Statements	Trade Confirmations	Account Notifications <sup>2</sup>	Quarterly Performance Reports <sup>3</sup>	Proxy and Shareholder Communications (PIN required) <sup>4</sup>
Primary Account Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN
Account Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN
Account Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN
Account Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN
Account Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN

<sup>1</sup> Tax documents are also available via electronic delivery; however, enrollment must be done online by the account owner. Please contact your financial organization for assistance.

<sup>2</sup> Please contact your financial organization for a list of the specific notifications eligible for electronic delivery.

<sup>3</sup> Please contact your financial organization to confirm availability of Quarterly Performance Reports for your account(s).

<sup>4</sup> A four-digit PIN is required for electronic delivery of proxy communications. For managed accounts, changes to delivery preferences for proxy and shareholder communications may need to be initiated by your advisor or money manager.





