

A woman with long dark hair, wearing a brown blazer over a white top, stands in an office. She has her arms crossed and is smiling. In the background, there are white bookshelves filled with books and a green plant. A blue square is in the top left corner, and a blue rectangular box contains the text.

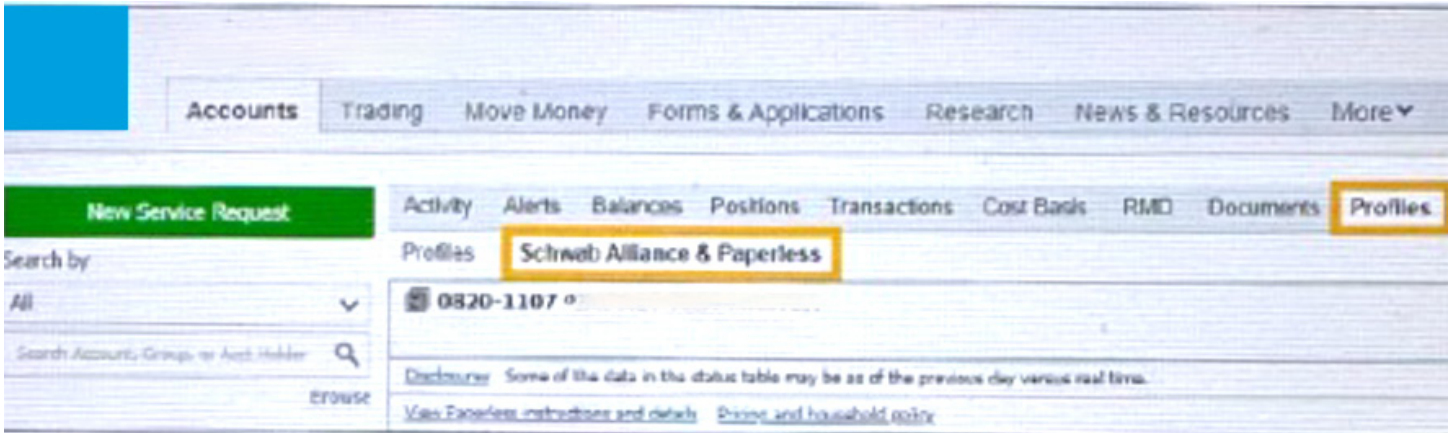
Electing paperless documents for your clients' accounts

This guide walks you through the steps to introduce your clients to paperless documents

Electing paperless documents for your clients' accounts

Paperless delivery of documents offers your clients secure access to statements, trade confirmations, shareholder materials and tax forms.

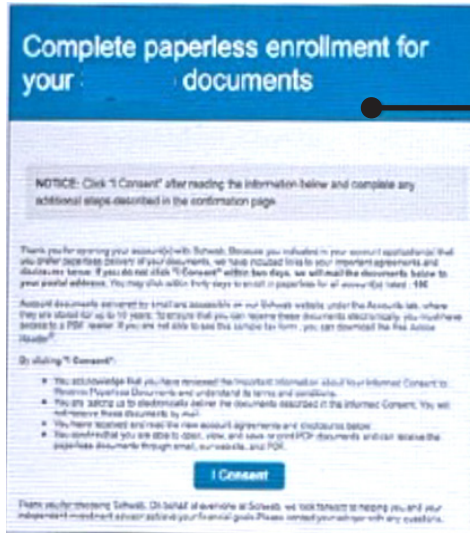
To initiate enrollment, from the master account level, select Profiles and then Paperless.



Click check boxes under “Enroll Paperless” to select the accounts you wish to receive electronic documents. Then click “Start Enrollment”.

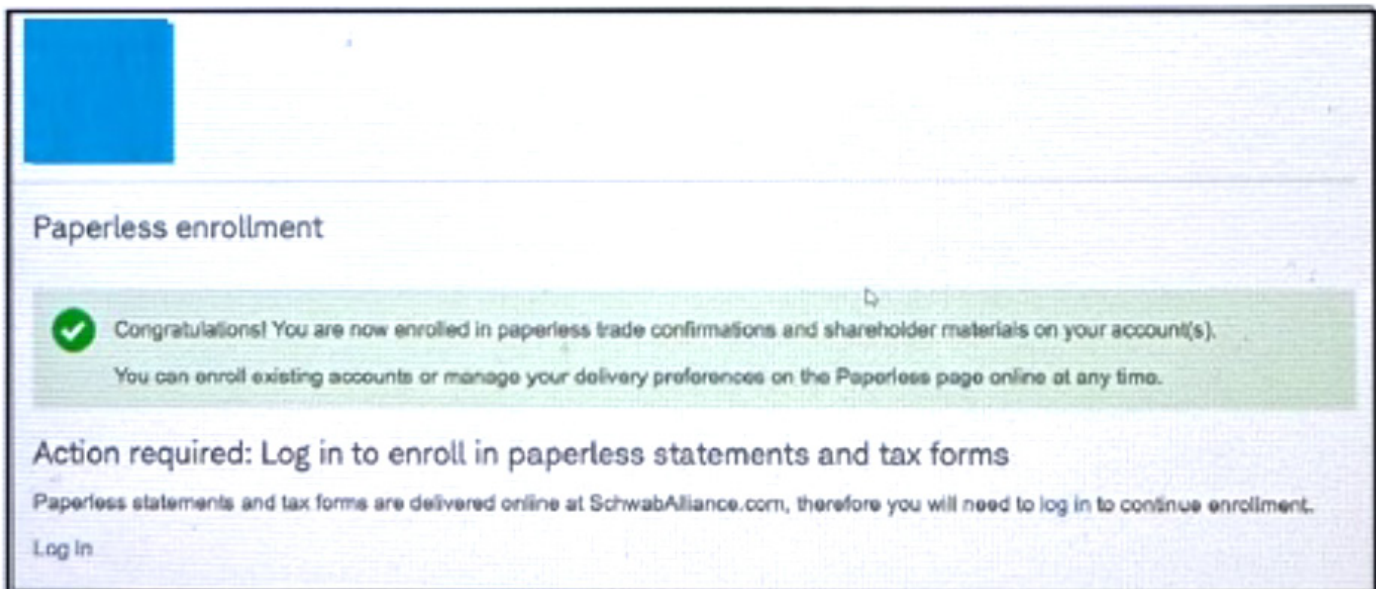


Your clients' experience with paperless enrollment



Invitation email
Your clients will receive an email that provides information about paperless delivery.

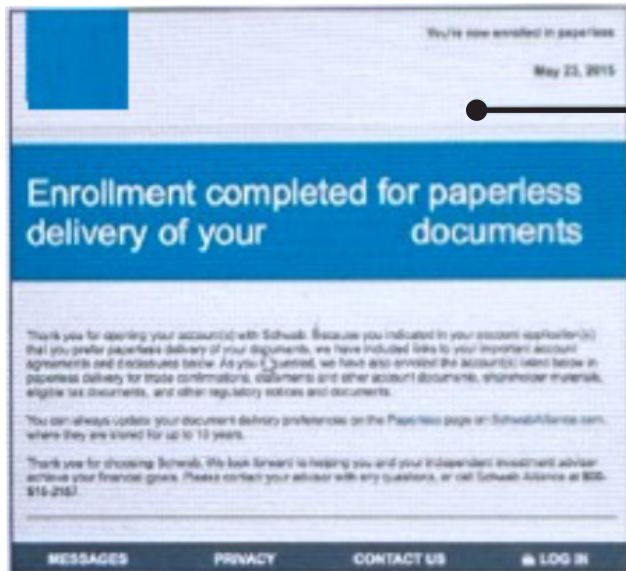
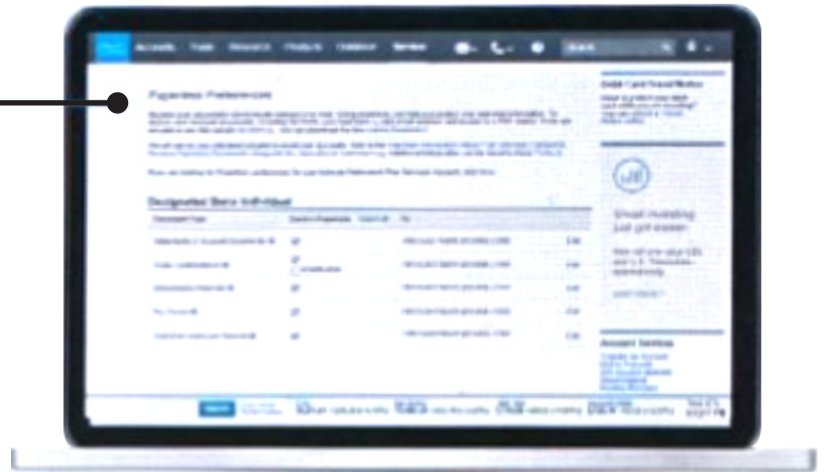
After clicking "I Consent" they are directed to the paperless documents landing page where they can log in and manage their delivery preferences.



Paperless landing page

Document options include:

- Statement and account documents
- Trade confirmations
- Shareholder Materials
- Tax Forms
- Year-end Gain/Loss reports



Confirmation email

Your clients will then receive a confirmation email

For educational purposes only.

A bunch of disclaimer stuff here. Por scientie, musica, sport etc, litot Europa usa li sam vocabular. Li lingues differe solmen in li grammatica, li pronunciation e li plu comun vocabules. Omnicos directe al desirabile de un nov lingua franca: On refusa continuar pagar custosi traductores. At solmen va esser necessari far uniform grammatica, pronunciation e plu sommun paroles. Ma quande lingues coalesce, li grammatica del resultant lingue es plu simplic e regulari quam ti del coalescent lingues. Li nov lingua franca va esser plu simplic e regulari quam li existent European lingues. It va esser tam simplic quam Occidental in fact, it va esser Occidental.

A un Angleso it va semblar un simplificat Angles, quam un skeptik Cambridge amico dit me que Occidental es. Li European lingues es membres del sam familie. Lor separat existentie es un myth. Por scientie, musica, sport etc, litot Europa usa li sam vocabular.