

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. ELECTRONIC DELIVERY PREFERENCES

Your account statements and the other documents below will be sent via electronic delivery (e-delivery) for all accounts linked to this user ID. This means that instead of receiving them on paper, you must access your documents online. You may update your preferences online, where you can also choose e-delivery for tax documents.¹ You must read and agree to the Electronic Delivery Agreement in Step 4 and sign in Step 5.

We will default to eDelivery of the following unless checked below:

- Paper account statements
- Paper account notifications²
- Paper trade confirmation/advices
- Paper Quarterly Performance Reports³
- Paper prospectuses⁴

Proxy, Shareholder and Reorganization Materials delivery preferences

- Check this box to receive Proxy, Shareholder and Reorganization Material communications via e-delivery for the primary account. 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 4 and sign in Step 5.

Four-Digit PIN

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¹ 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.

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

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

⁴ 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.



STEP 3. LINK ACCOUNTS TO THE USER ID

Please list all accounts that should be linked to this User ID. For U.S. accounts, the Social Security number of the primary account holder 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 5.

If you select to receive Proxy, Shareholder Communications and Reorganization Materials electronically for the accounts linked to this user ID, 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 4 and sign in Step 5.

	ACCOUNT ACCESS ONLY	ELECTRONIC DELIVERY	
	Link to Primary Account	Proxy and Shareholder Communications (PIN required)	
Primary Account Number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>			
Account Number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Account Number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Account Number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Account Number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	PIN <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

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

STEP 4. INVESTOR TERMS AND CONDITIONS

Electronic Delivery Terms and Conditions

"You" means the account owner(s) of the account.

"Account Communications" means account statements, trade confirmations or other notices, disclosures and other information related to your account including without limitation prospectus, quarterly, semi-annual or annual shareholder reports, proxy statements, and legal and regulatory notices and documents.

"Authorized User" means a person that you have authorized to be provided a user ID which enables access to your account online.

You agree that your financial organization and your clearing broker Pershing LLC (Pershing) may make the account communications available in an electronic form as described herein instead of mailing them in paper form.

Account communications will be made available to you online via a website maintained by Pershing on behalf of your financial organization (the "website"). Account communications will be available in portable document format (PDF). You affirm that you have installed a recent version of Adobe Acrobat Reader or other software application that enables you to view and print your account communications. You may print or save a copy of any of the account communications at any time. You may request a mailed copy of any of your account communications by contacting your financial organization.

An electronic mail ("email") notification will be sent when account communications are available to be accessed on the website. The email will provide you with the URL of the website. The email notification(s) will be sent to the email address(es) you provided directly to your financial organization or provided by registering on the website. You may view and verify your email address(es) via the website, and change the email address(es) through the website or by contacting your financial organization.

In the event that a notice of undeliverable status of an email notification is received by Pershing, your financial organization or Pershing may send a paper notification by U.S. mail to the postal address you provided directly to your financial organization. The paper notification will notify you of the availability of Account Communications on the website, provide the URL of the website where account communications may be accessed, and direct you to update your email address of record in paper form.

In the event of an email notification failure as defined by Pershing, Pershing may discontinue your enrollment in electronic delivery and reset your account communications delivery preferences so that future documents will be delivered to your mailing address of record in paper form. If you lose access to the website, you should contact your financial organization to have your access reinstated. By providing this Electronic Delivery Consent, you affirm that you have provided a valid email address directly to your financial organization or by registering on the website, have access to the Internet and are at least 18 years of age. You agree that electronic delivery of the account communications is deemed accepted, regardless of whether you access or view a particular account communication document. You acknowledge that any authorized users for your account are able to make changes to the electronic delivery settings for your account, and you agree to accept responsibility for such changes.

You may change your delivery preferences, such as resuming applicable paper account communications, by following the instructions on the website, or by contacting your financial organization directly for assistance.

