

Enrolling in E-Delivery of Tax Forms provides our clients with several benefits:

- Allows faster access to this time-sensitive information, eliminating mail delays.
- Stifel will notify you via e-mail as soon as forms are available online, so you will have immediate access.
- If you use TurboTax[®] or H&R Block[®] to prepare your return, you can save the Tax Return on your computer with the PDF of your 1099 supporting documentation.
- If your Form 1099 is pending information from the issuers of your investments, your “1099 Preliminary Statement” will be available for E-Delivery ONLY. You will receive another e-mail when the Final Form 1099 is available.

Sign Up for E-Delivery of Tax Forms:

1. Clients can log in to their Stifel Access account. If clients are not currently signed up for Stifel Access, they may create a login by going to www.stifel.com Stifel Access “Sign Up.”
2. Click on eDocuments, Delivery Preferences, and change the delivery preference for the Tax Forms option. Clients must change this election; neither the home office nor the branch can change their delivery election for them.
3. If a client’s monthly statements are household, all accounts in the household must have the same delivery preference.

The IRS does not allow certain forms to be delivered electronically. Therefore, Stifel will continue to mail these forms to our clients. These Forms include the 1042-S, 2439, and 480.6 (A-D).

If you elect to receive Tax Forms electronically and would like to receive a paper copy of Form 1099, without electing out of E-Delivery, please contact your Financial Advisor.

If Stifel receives a bounce back for an undeliverable e-mail address, Stifel will automatically switch the primary account as well as all related household accounts back to paper. If this takes place, a letter will be sent notifying you of this change. You will be required to re-enroll in E-Delivery if you receive one of these letters.

Please contact your Financial Advisor or Stifel’s Client Services Department at (800) 679-5446 or snclientservices@stifel.com if you have any questions or need additional assistance signing up for E-Delivery.