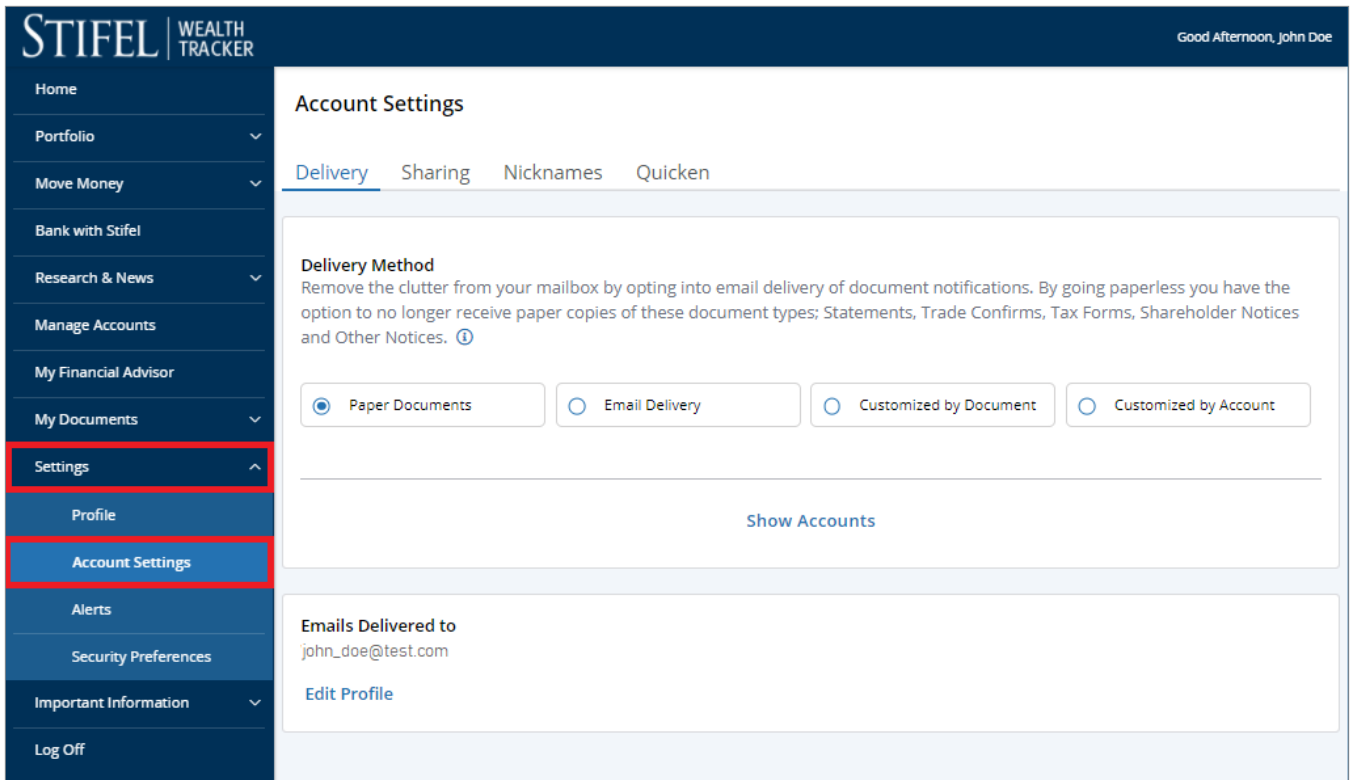


Stifel Wealth Tracker now allows you to easily and conveniently select how you would like to receive Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices. The new Delivery section of our Account Settings tab allows you to select whether you would like to receive these important documents in an all-paper format or electronically via e-mail. You can also customize your preferences by either document type or set specific preferences for any or all of your accounts.

1. Log in to your Stifel Wealth Tracker account. Select Settings, Account Settings, then select the Delivery tab.



2. Within the **Delivery** tab, select how you want eligible document types delivered.

The *Delivery Method* options are:

- **Paper Documents:** Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices for all accounts will be delivered via mail.
- **E-mail Delivery:** A notice will be delivered to the e-mail address affiliated with the Stifel Wealth Tracker ID when a new Statement, Confirm, Tax Form, Shareholder Notice, or Other Notice is available to be viewed electronically.
- **Customized by Document:** Customize Paper or E-mail Delivery for Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices which will be applied to all accounts. See additional details below.
- **Customized by Account:** Customize Paper or E-mail Delivery for Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices for each account individually. See additional details below.

Delivery Method
Remove the clutter from your mailbox by opting into email delivery of document notifications. By going paperless you have the option to no longer receive paper copies of these document types; Statements, Trade Confirms, Tax Forms, Shareholder Notices and Other Notices. ⓘ

Paper Documents Email Delivery Customized by Document Customized by Account

[Show Accounts](#)

Customized by Document

Customize the delivery methods for each unique document type. The delivery method selected for **each unique document type** will be applied to **all accounts**.

STIFEL | WEALTH TRACKER Good Afternoon, John Doe

Home
Portfolio
Move Money
Bank with Stifel
Research & News
Manage Accounts
My Financial Advisor
My Documents
Settings
Profile
Account Settings
Alerts
Security Preferences
Important Information
Log Off

Account Settings

[Delivery](#) [Sharing](#) [Nicknames](#) [Quicken](#)

Delivery Method
Remove the clutter from your mailbox by opting into email delivery of document notifications. By going paperless you have the option to no longer receive paper copies of these document types: Statements, Trade Confirms, Tax Forms, Shareholder Notices and Other Notices. ⓘ

Paper Documents
 Email Delivery
 Customized by Document
 Customized by Account

Statements	Confirms	Tax Forms	Shareholder Notices	Other Notices
<input checked="" type="radio"/> Paper Documents <input type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery	<input checked="" type="radio"/> Paper Documents <input type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery

[Show Accounts](#)

Emails Delivered to
john_doe@test.com

Customized by Account

Set **each account's** unique delivery method individually. *Select Paper, E-mail Delivery, or Customized by Document for each account* available for maximum customization.

The screenshot displays the 'Account Settings' page in the Stifel Wealth Tracker interface. The left sidebar contains navigation options, with 'Settings' and 'Account Settings' highlighted in red. The main content area is titled 'Account Settings' and includes tabs for 'Delivery', 'Sharing', 'Nicknames', and 'Quicken'. Under the 'Delivery' tab, the 'Delivery Method' section explains that users can opt into email delivery to avoid paper clutter. Four radio button options are shown: 'Paper Documents', 'Email Delivery', 'Customized by Document', and 'Customized by Account', with the latter selected and highlighted in red. Below this, a 'Future Accounts' section has an 'Email Delivery' dropdown menu highlighted in red. The 'John and Jane Joint Account' section shows a 'Customized by Document' dropdown highlighted in red, followed by a table of delivery preferences for Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices. The 'John Individual Account' has an 'Email Delivery' dropdown highlighted in red, and the 'Timothy 529' account has a 'Paper Documents' dropdown highlighted in red.

Future Accounts

Select the Delivery Method that should be applied to future accounts you may open at Stifel. If you make no election in this field, the default delivery method will be Paper Documents. You can make changes to this election at any time.

The screenshot shows the "Account Settings" page in the Stifel Wealth Tracker interface. The left-hand navigation menu is on the left, with "Settings" and "Account Settings" highlighted in red. The main content area is titled "Account Settings" and has tabs for "Delivery", "Sharing", "Nicknames", and "Quicken". Under the "Delivery" tab, there is a "Delivery Method" section. It contains a descriptive paragraph: "Remove the clutter from your mailbox by opting into email delivery of document notifications. By going paperless you have the option to no longer receive paper copies of these document types; Statements, Trade Confirms, Tax Forms, Shareholder Notices and Other Notices." Below this are four radio button options: "Paper Documents", "Email Delivery", "Customized by Document", and "Customized by Account". The "Customized by Account" option is selected and highlighted with a red box. Below the radio buttons is a "Hide Accounts" button. A red box highlights the "Future Accounts" section, which includes the text "Elections made here will automatically set delivery preferences for new accounts." and a table of delivery preferences for various document types. A dropdown menu is open over the "Future Accounts" section, showing options: "Customized by Document", "Paper Documents", "Email Delivery", and "Customized by Document" (highlighted in blue).

Statements	Confirms	Tax Forms	Shareholder Notices
<input type="radio"/> Paper Documents	<input type="radio"/> Paper Documents	<input checked="" type="radio"/> Paper Documents	<input type="radio"/> Paper Documents
<input checked="" type="radio"/> Email Delivery	<input checked="" type="radio"/> Email Delivery	<input type="radio"/> Email Delivery	<input checked="" type="radio"/> Email Delivery

Questions?

Contact Stifel Wealth Tracker at **(866) 697-8433**.

Monday – Friday	Saturday
6:00 a.m. – 7:00 p.m. Central	7:30 a.m. – 4:00 p.m. Central

STIFEL

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