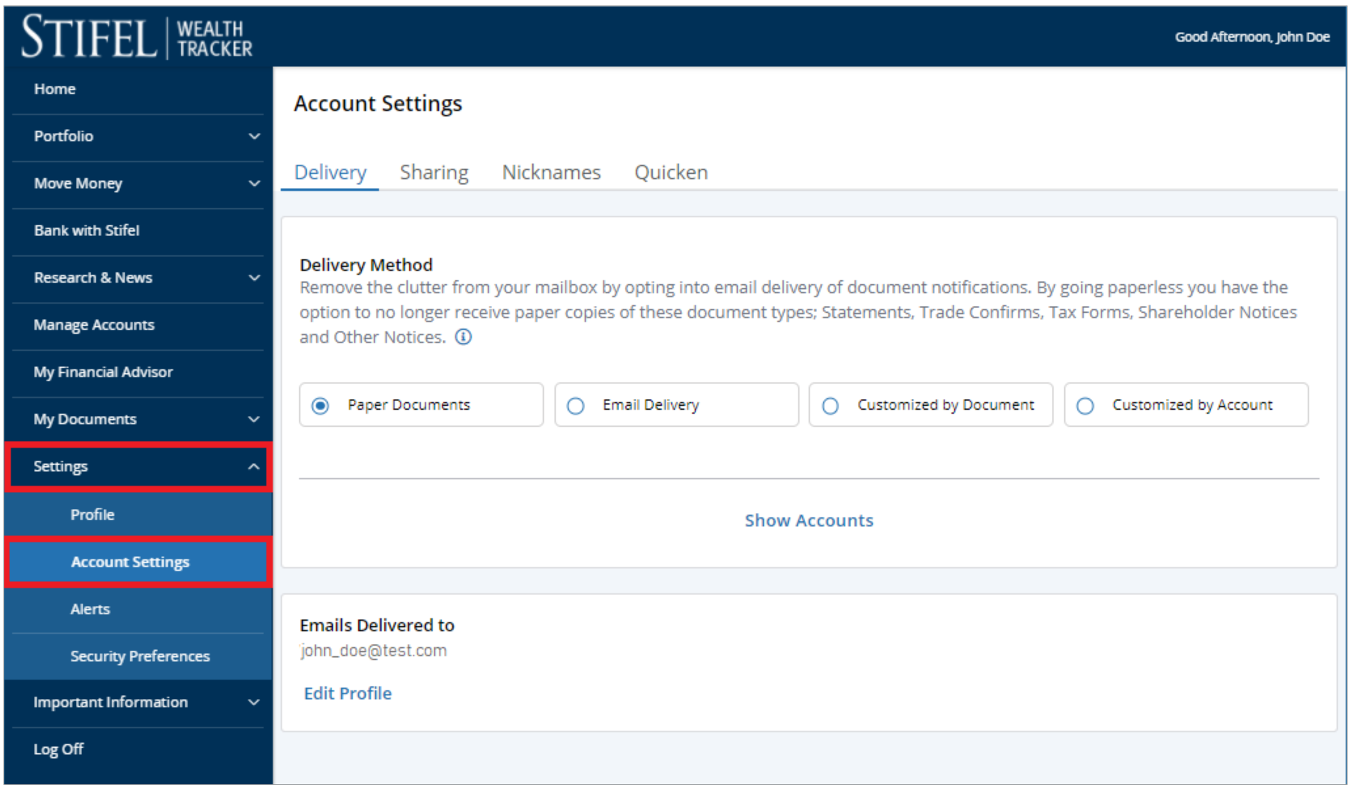
eDelivery Enrollment

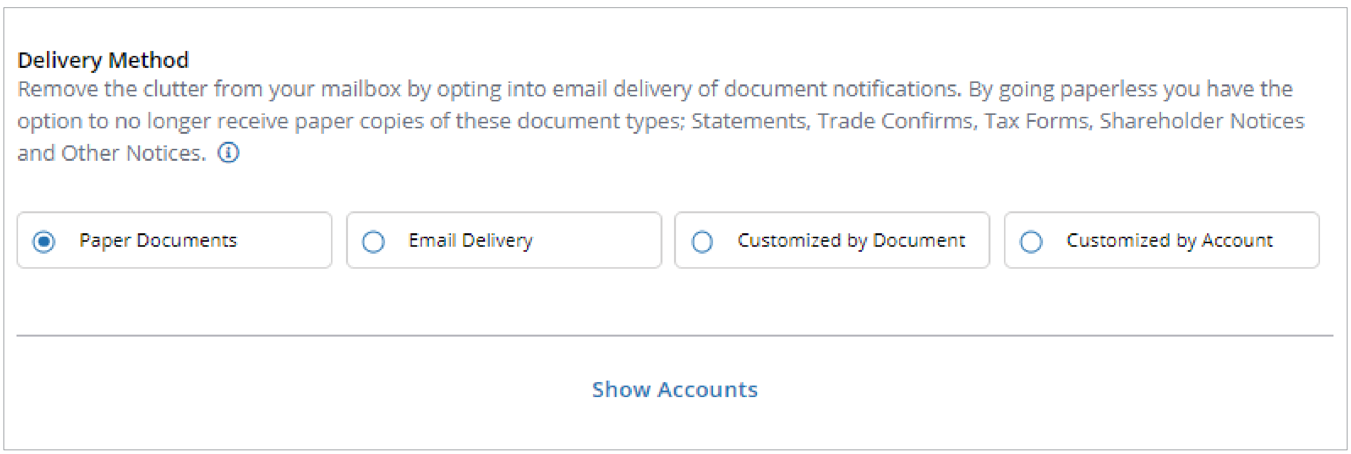
Stifel Wealth Tracker now allows you to easily and conveniently select how you would like to receive Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices. The new Delivery section of our Account Settings tab allows you to select whether you would like to receive these important documents 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.



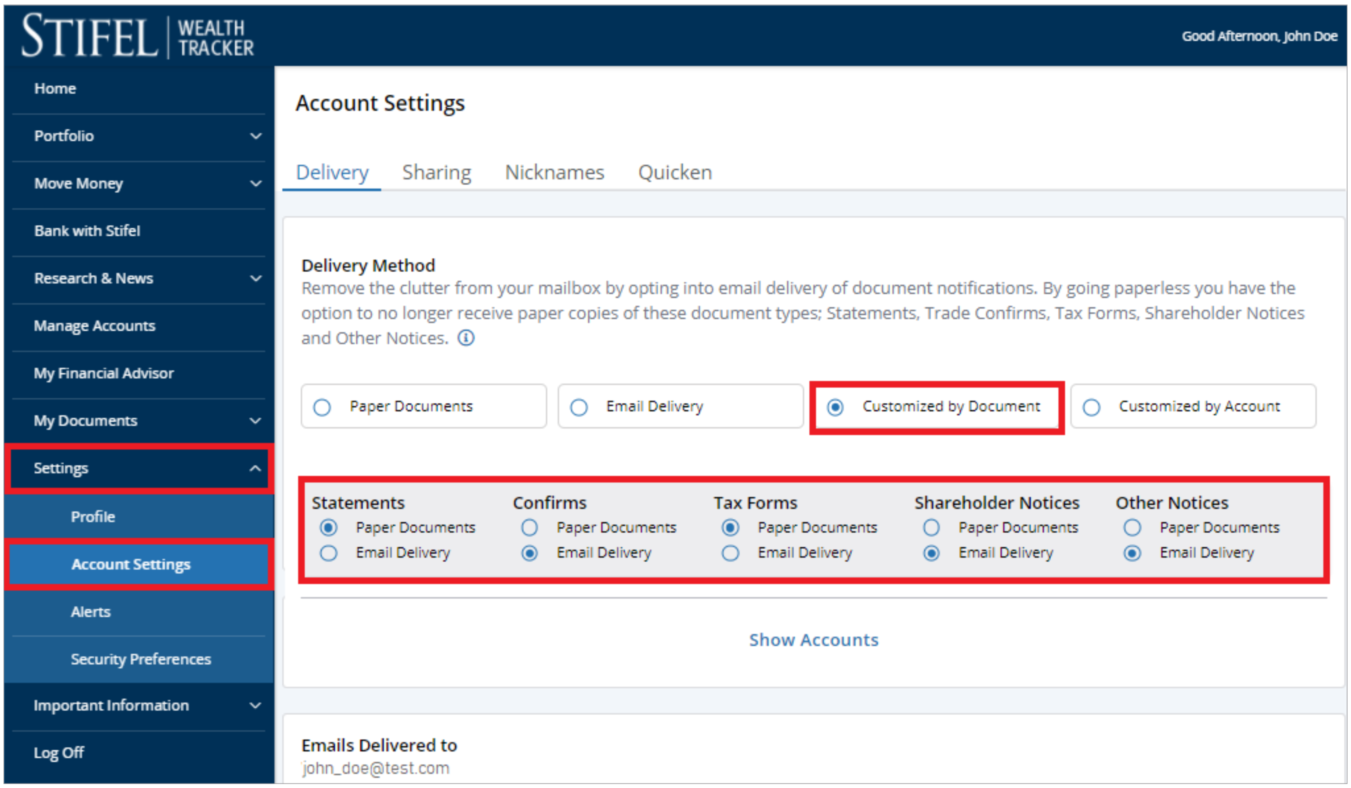
2. Within the **Delivery** tab, select how you want eligible document types delivered.
The Delivery Method options are:

- **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.



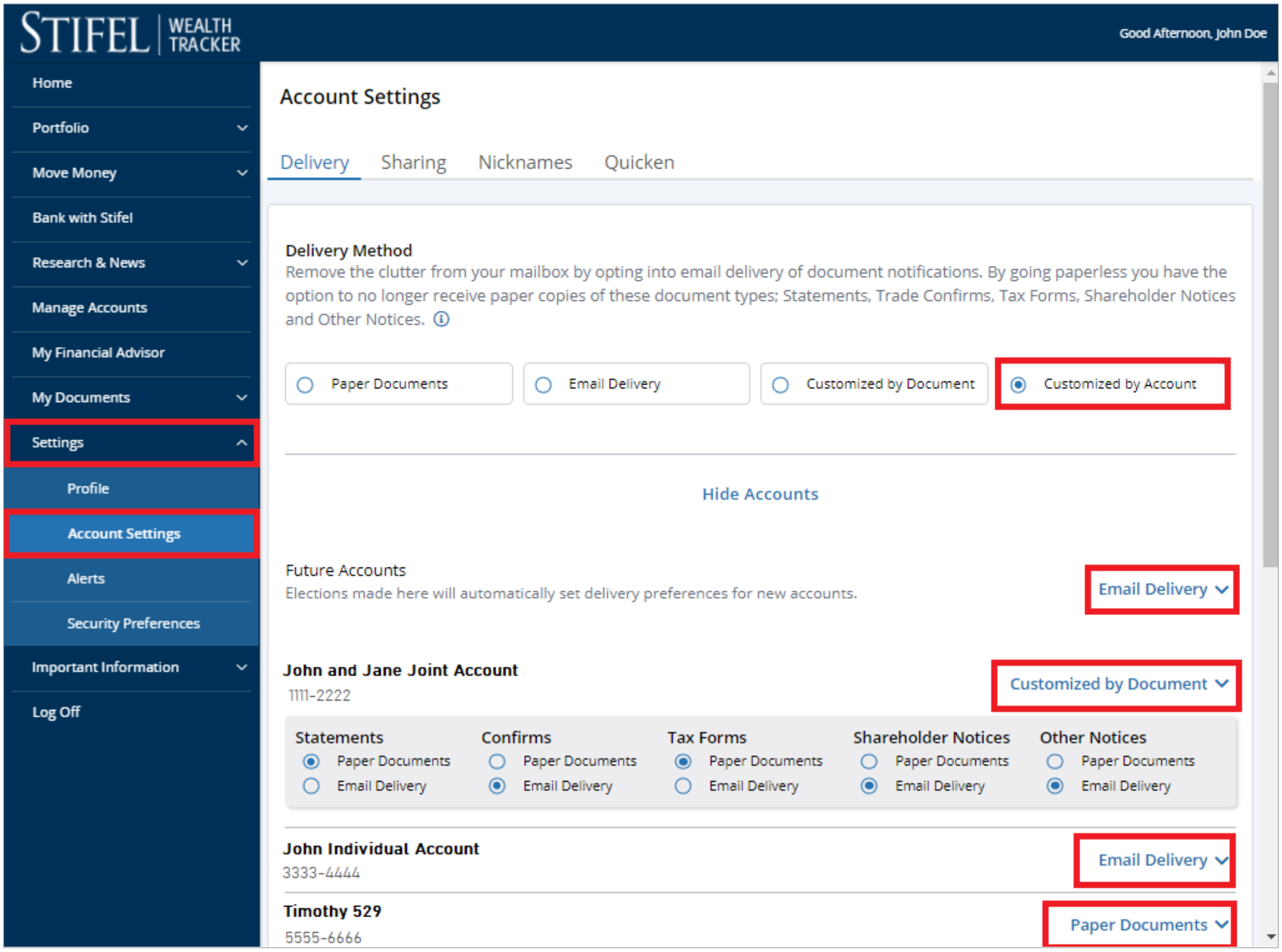
Customized by Document

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



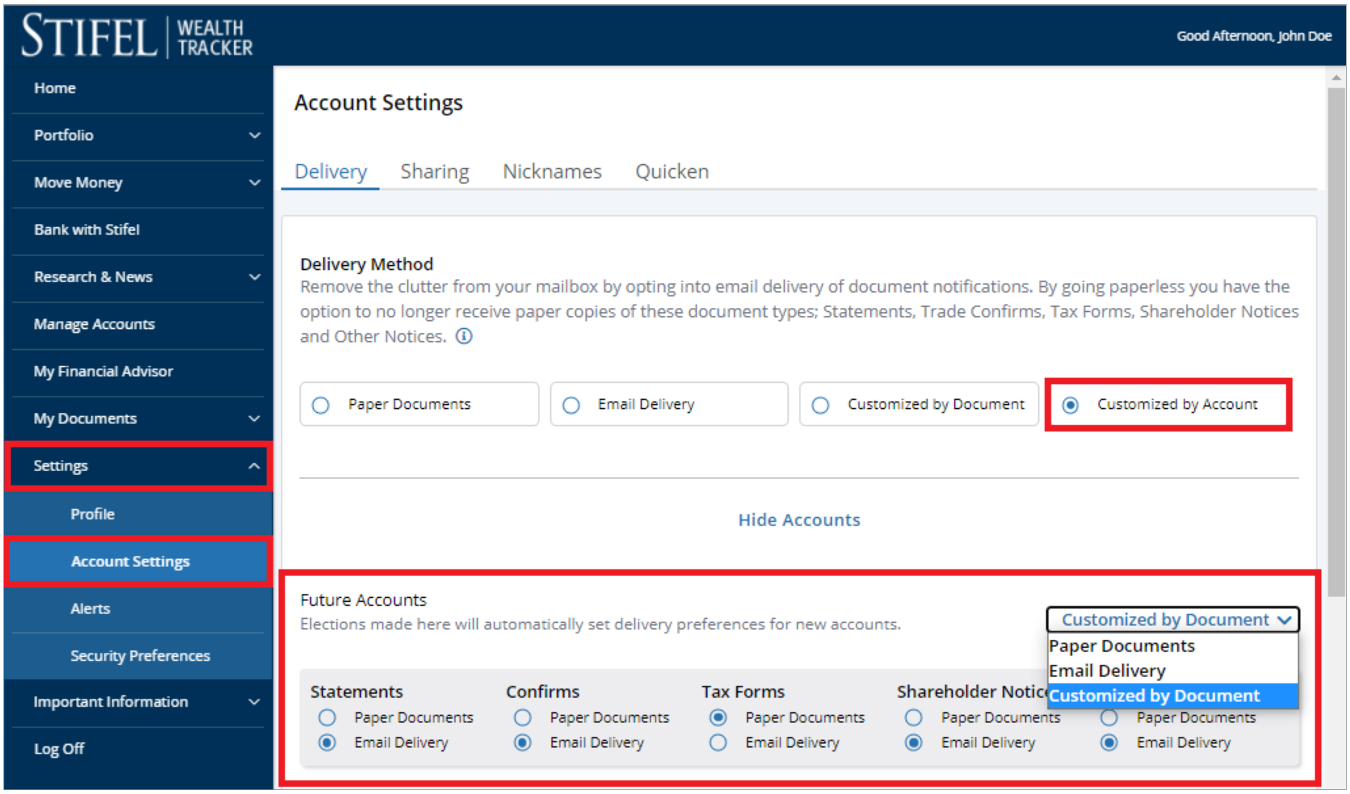
Customized by Account

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



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.



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

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