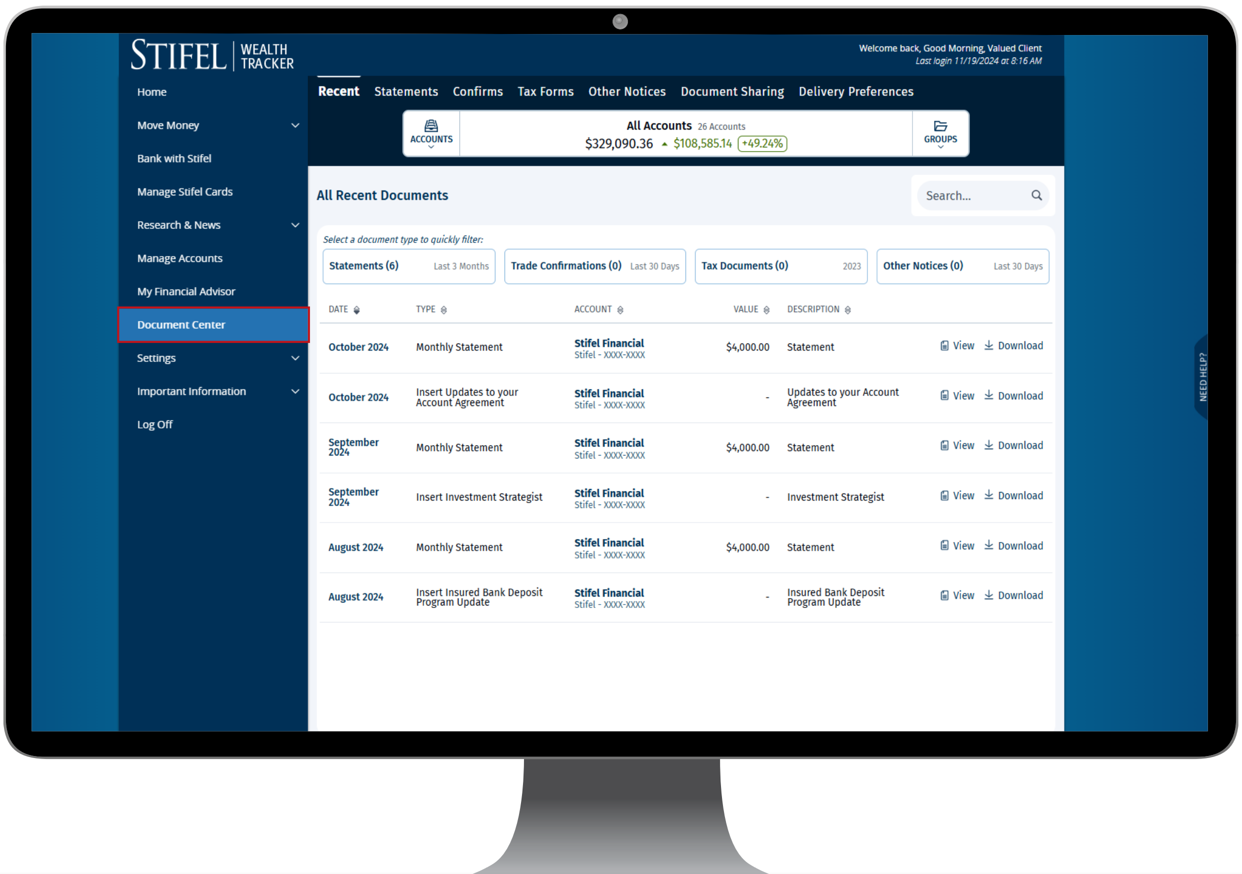
STIFEL
WEALTH TRACKER

Document Center

Track all your important financial documents in one place for easy access and management.

Within the Wealth Tracker **Document Center**, you can:

- Access all your **Recent** documents, **Statements**, **Confirms**, **Tax Forms**, and **Other Notices**.
- **Share secure and confidential documents** with your Financial Advisor team, using the **Document Sharing** portal.
- Update your document **Delivery Preferences** for all or some documents to eDelivery or paper delivery.



Recent **Statements** **Confirms** **Tax Forms** **Other Notices** **Document Sharing** **Delivery Preferences**

Recent

Access and filter your recent documents by type or use the search bar to quickly retrieve specific documents.

Statements

View or download your current and previous Stifel account statements. Wealth Tracker provides access to statements dating back to 2009.

Confirms

Quickly view confirmations of trades executed in your Stifel accounts.

Tax Forms

Tax forms are available throughout the tax season starting in mid-January. You can access two years of tax forms through Wealth Tracker.

To download tax forms on a desktop, click the **Download** link next to the appropriate document. On a mobile device, click on the **View** link and follow the steps for downloading per your mobile device.

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Other Notices

View documents related to account actions or activities, including shareholder notices, third-party disbursements, and more. Notices are available for a specific period based on their type. View and vote shareholder notices in Wealth Tracker instead of having to go to a separate website and provide a control number.

Currently, these documents are included under Other Notices:

- Third-Party Disbursements
- Annual ADV Mailings
- Welcome Letter
- Stifel Bank Account Notices

Shareholder Notice Expirations

Shareholder notices are available within Wealth Tracker for a specific period of time based on their distribution type.

- **Prospectus** – 45 calendar days after the date received
- **Proxy** – Seven calendar days after the due date
- **Regulatory** – 45 calendar days after the date received
- **Reorg** – Seven calendar days after the expiration date
- **Class Action** – 120 days after the date received (Claims Pending and Claims Filed expire 10 years after the date received)

Document Sharing

Both you and your Financial Advisor team can upload, share, review, and export documents through the Document Sharing portal. You'll receive an e-mail notification whenever new documents are shared, updating you in real time.

Delivery Preferences

Easily and conveniently select how you would like to receive statements, confirms, tax forms, shareholder notices, advisory notices, and other notices. Reduce mailbox clutter by opting for e-mail delivery of document notifications.

Go paperless and choose to receive important documents electronically or in paper format. Customize your preferences by category or account.

Delivery Method options are:

- **Paper Documents:** To be delivered via mail.
- **E-Mail Delivery:** We'll notify you at the e-mail address affiliated with your Stifel Wealth Tracker ID when your documents are available to be viewed electronically.
- **Customized by Category:** Customize Paper or E-Mail Delivery. The customized 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 Documents, E-Mail Delivery, or Customized by Category for **each account** available for maximum customization.
- **Future Accounts:** Select the Delivery Method to be applied to any future accounts you open at Stifel. If you do not make an election in this field, the default delivery method will be Paper Documents. You can change this election at any time.

Questions?

Contact Stifel Wealth Tracker at (866) 697-8433 or wealthtracker@stifel.com.

Monday – Friday
5:00 a.m. – 8:00 p.m. Central

Saturday – Sunday
5:00 a.m. – 6:00 p.m. Central

Log in Now!
tracker.stifel.com

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