## **Access My Portfolio**

Electronic Delivery of Statements, Tax Forms, Prospectus & Proxy Materials.

## To Sign Up for Electronic Delivery of Statements, Tax Forms, Prospectuses and Proxy Materials:

- 1. Login to <u>www.AccessMyPortfolio.com</u>
- 2. Click on **Profile/Logout** in top right corner of screen.
- 3. Click on **My Profile**.

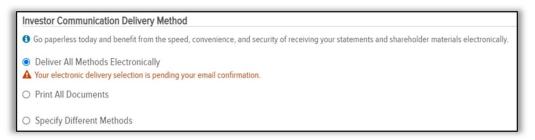
=	Access My Portfolio	Settings 🄅		
-	Dashboard		💄 My Profile 🔚	Ø
▦	% Linked Accounts shown.       Summary of Accounts @       How My Money is Invested @		🕞 Log Out	

4. This page will allow you to specify electronic delivery of Statements, Tax Forms, and Prospectuses & Proxy Materials.

=	Access My Portfolio				Settings 🔹 P	ROFILE/LOGOUT 🐣	CONTACT US 📞
-	My Profile						
	Below is your profile information. You may update specific items by clicking the pencil icon 💋 n	ext to the information you wish to update. If no pencil icon is present, it means this information is not updatable. When yo	are finished with your updates, click the Save Chang	es button. If you wish not to save the changes, click the Cancel button.			
	Client Details						
Last.	Name	Home Address		Primary Phone Number			
0	John Smith	123 Main Street Philadelpia, PA 19130		1-800-000-0000			
<u>4</u>	E-Mail Address						
8	john@aol.com						
1000	Investor Communication Delivery Method						
	0 Go paperless today and benefit from the speed, convenience, and security of receiving your st	atements and shareholder materials electronically.					
	Deliver All Methods Electronically						
	O Print All Documents						
	Specify Different Methods						
	▶ Statement						
	O You receive an email to confirm your new statement delivery method. If you do not confirm your new statement delivery method.						
	Statement Name	Account Name & Number or Account Group		Recipient Name	Frequency	Delivery Method	
	Advisor Standard	John Smith IRA # 123456		John Smith	Quarterly	Electronic	~
	Tax Forms     You receive an email to confirm your new tax form delivery method. If you do not confirm	your selection then your Tex Form Delivery Method will be set to Print.					
	Tax Form Recipient		Related Accounts			Delivery Method	
	John Smith		John Smith IRA # 123456	3		Print	~
	Cancel					S S	ave Changes 🖺
		Disclaimer i Term	s & Conditions   Privacy Policy				



5. Select Deliver All Methods Electronically or Specify Different Methods and click Save Changes.



6. Scroll to the bottom of Terms and Conditions and select I Agree, then Save Changes. SEI will send a consent email to our email address on file. In order to finalize your request for electronic delivery, you must click the link in the email to complete the process.

Terms and Conditions
Statements, Notices and Communications e-delivery Online Agreement
By selecting the "1 Agree" checkbox below, you give your affirmative consent ("Consent") to SEI Private Trust Company ("SPTC") to the electronic delivery of certain tax forms and account statements ("EDelivered Document(s)") instead of receiving paper copies mailed via US Mail to the address of record for all accounts associated with your Social Security Number and/or the Tax
Identification Number for which you are authorized or accounts in which you are a primary account investor ("Account" or "Accounts"). By selecting the "I Agree" checkbox below, you also give your Consent to receive other periodic notices and communications ("Notifications") from SPTC or any of its affiliates and further agree to the following terms and conditions:
<ol> <li>You are responsible for maintaining a valid email address. You can update your email address at any available time through your Access My Portfolio website or mobile app. At the time of first use, you will be asked to take additional steps to validate your email. You may update your email</li> </ol>
address through your client access website.  2. For EDelivered Documents, you will receive an e-mail to the verified email address advising that your EDelivered Documents are available. You may continue to receive tax forms and paper statements via the Access Mv Portfolio website. You may continue to receive tax forms and paper statements
Cancel Save Changes

7. Once you click the link in the email, it will bring you back to <u>www.AccessMyPortfolio.com</u>. If the process was completed successfully, you will be greeted with a success message on the My Profile page of the website indicating that your electronic delivery selection is complete.

