## Investor360°® Paperless Preferences

You can elect to go paperless and receive email notifications of brokerage statements, confirmations, tax documents, correspondence, and shareholder reports. You'll be prompted to select your preferences at your initial login but you may change them later.

This document walks you through how to enroll at initial login and edit your preferences at a subsequent login.

## **Initial Login Enrollment**

When you first log in to Investor360°, you'll need to complete first-time access setup, which includes selecting your paperless preferences.

 In the Paperless Preferences section, define your preference by account and document type. Click either the radio button or Select All if you wish to have the same delivery for every document type postal delivery or e-delivery.

**Please note:** If you choose e-delivery, you must also select the recipient and enter their email address.

2. Select Finish.

lease note: Choosing E-delivery may not prevent all physic vailable for paperless delivery.	al mail because not all client co	mmunications ar
DOCUMENT TYPE	POSTAL DELIVERY	E-DELIVERY
	Select All	Select All
Confirms	0	۲
Customer Correspondence	Õ	۲
Tax Documents	0	۲
Statements	0	۲
Shareholder Reports	0	
Send E-delivery to* Em	ail*	

**Please note:** The email entered here is for e-delivery of the specified document types only. If you change your email address under Profile, it **does not** automatically change the email used for e-delivery. You will need to manually change it under Paperless Preferences, as shown in Step 3 in the Subsequent Login Enrollment section below, to have documents sent to the new email address.

	Welcome Kevin 👻 🛛 Lo	og Out 🔒
-	Profile	
	Security	(
Hid	Paperless Preferences	shboard

 After enrollment in e-delivery, you'll begin to receive notifications via email when documents are generated and available online. Below is an example of a notification for your reference.
 Please note: The email for confirmations, customer correspondence, tax documents, and statements prompts you to go to Investor360° to view them, whereas shareholder reports link to the sponsor website.

See your statement online now.	View in your browser
🖉 Commonw	ealth
See your statemen For investment accounts: X00000001,X00 Dear Investor(s),	t online now
To view your statement and supplemental r	notices (if applicable), please:
<ol> <li>Click here to sign in to your investm</li> <li>Enter your ID and password</li> <li>Navigate to the online documents s</li> </ol>	ent account ection of your account
You are receiving this email because you ha your delivery preferences, please log in to y	ave enrolled in eDelivery. If you wish to update your account.
Sincerely, COMMONWEALTH FINANCIAL NETWORK	
Having an issue logging in with a Safari bro	wser? Click <u>here</u> .
Help:	
Questions? Please contact your representat (Note: Do not reply to this email. Any email received wil	ive. I not be reviewed or monitored.)
This communication is a transactional/relati LLC. Do not reply to this email message as i	ionship message from National Financial Services it was automatically generated.
Account carried with National Financial Sen 492637.19.0 CV4	vices LLC, Member NYSE, <u>SIPC</u> .
EMAIL REF# 12345678901.2345678	
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## Subsequent Login

You have two ways to edit your paperless preferences after your initial login set up: use the Welcome dropdown menu or select the Paperless Preferences link shown on the Statements, Tax Documents, Customer Correspondence, and Confirms pages. Regardless of the method you choose, the steps will be the same.

1. Select the Welcome dropdown menu with your name in the top right corner of any page in Investor360° and then select **Paperless Preferences** *or* select the **Paperless Preferences** link shown in the top right corner on Statements, Tax Documents, Customer Correspondence, and Confirm pages.



Commonwealth Financial Network   781-736-0700				Log Out 🔒	
Dashboard Portfolio 🕶 Insurance	Statements & Documents 👻 🛺	arkets & Research			?
Statements   All Accounts 🗸	Statements Tax Documents		📌 Paperles	ss Preferences	
Consolidated Statement	Customer Correspondence				
As of Vesterday	Documents				

**Please note:** If you have accounts that are not signed up for paperless delivery, you will receive the following pop-up message that allows you to easily click **Sign Up**, which will elect paperless delivery for the accounts referenced.



2. The accounts available for paperless and your current selections for each document type—postal delivery or e-delivery—will be displayed. Select **Edit Paperless Preferences** to make changes.

Profile	Edit Paperless Preferences		
	Melissa's IRA		
Security	DOCUMENT TYPE	POSTAL DELIVERY E-DELIVE	ERY
	Confirms	~	
Paparlass Preferences	Customer Correspondence	×	
rapeness rieleiences	Tax Documents	×	
	Statements	×	
	Shareholder Reports	×	
	Send E-delivery to	Email	
	Melissa's Individual		
	Melissa's Individual DOCUMENT TYPE	POSTAL DELIVERY E-DELIVE	ERY
	Melissa's Individual DOCUMENT TYPE Confirms	POSTAL DELIVERY E-DELIVE	ERY
	Melissa's Individual DOCUMENT TYPE Confirms Customer Correspondence	POSTAL DELIVERY E-DELIVE	ERY
	Melissa's Individual DOCUMENT TYPE Confirms Customer Correspondence Tax Documents	POSTAL DELIVERY E-DELIVI	ERY
	Melissa's Individual DOCUMENT TYPE Confirms Customer Correspondence Tax Documents Statements	POSTAL DELIVERY E-DELIVE	ERY
	Melissa's Individual DOCUMENT TYPE Confirms Customer Correspondence Tax Documents Statements Shareholder Reports	POSTAL DELIVERY E-DELIVE	ERY

3. Review/edit the preferences by account and document type. If you choose e-delivery, you must also select the recipient and enter their email address. Now select **Save**.

Tome	DOCUMENT TYPE	POSTAL DELIVERY	E-DELIVERY	
		Select All	Select All	
iecurity	Confirms	0	۲	
	Customer Correspondence	Õ	•	
Paperless Preferences	Tax Documents	0		
	Statements	0		
	Shareholder Reports	0	۲	
	Send E-delivery to E	mail*		
	×			
	Melissa's Individual			
	DOCUMENT TYPE	POSTAL DELIVERY	E-DELIVERY	
		Select All	Select All	
	Confirms	0		
	Customer Correspondence	0		
	Tax Documents	ő		
	Statements	õ		
	Shareholder Reports	0		
	**************************************			
	Send E-derivery to E	mail.		

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Welcome Kevin 👻 🛛 Lo	og Out 🔒
Profile	
Security	(?
Paperless Preferences	shboard

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