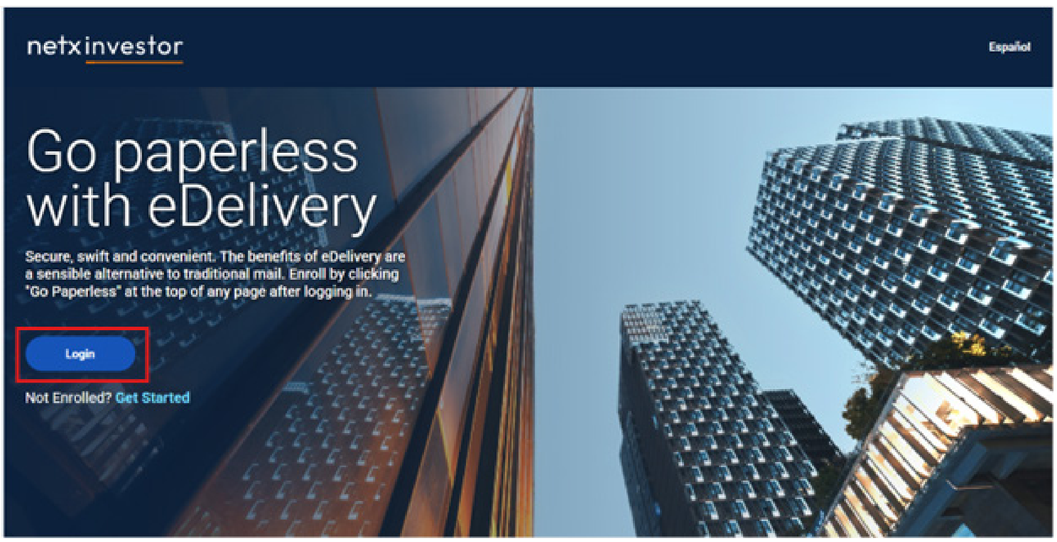
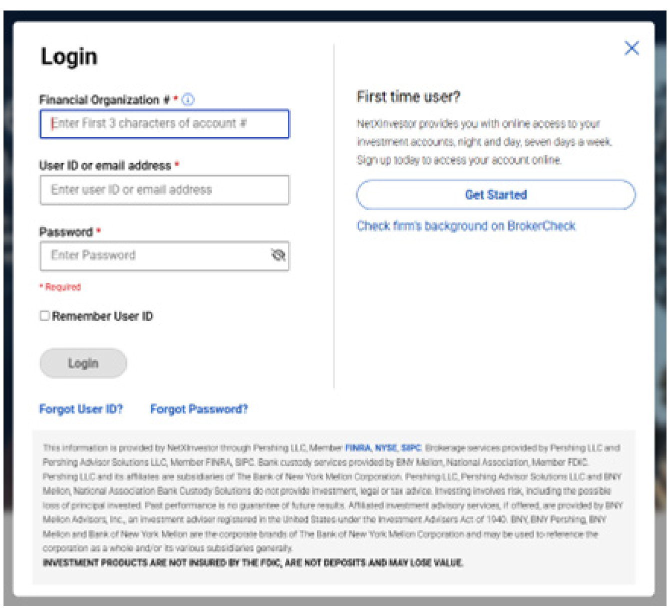
NETXINVESTOR: HOW TO SET UP E-DELIVERY

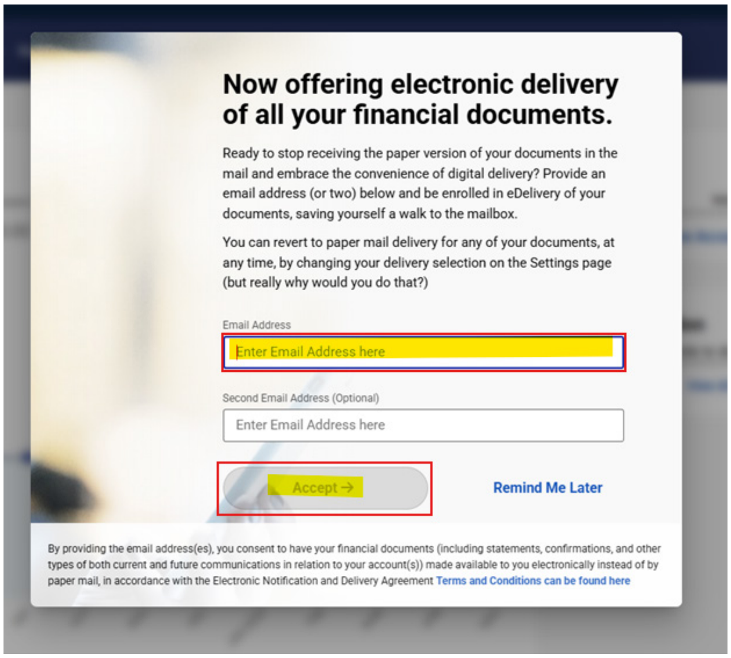
How to update e-Delivery preferences for NetXInvestor

1. Log in to your NetXInvestor account using the Financial Organization #, User ID or email address, and password.



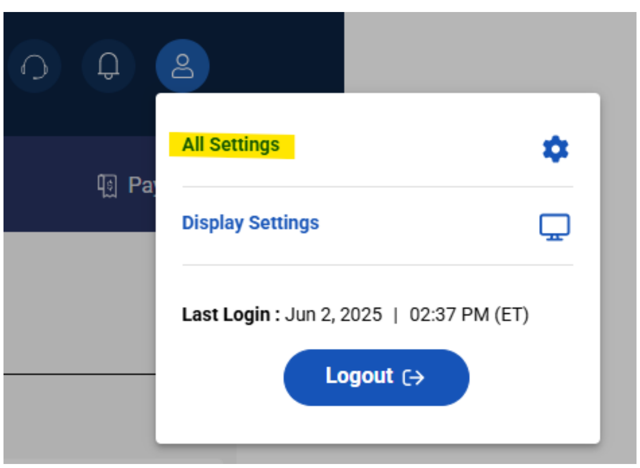


2. Once logged in, you may receive a pop-up that states "Now offering electronic delivery of all your financial documents." If you would like all documents to be e-Delivered, put your email address in the first email address field. You may add a secondary email address if you would like, but it is not required. Once that is complete, select **Accept**. Now all the documents for the accounts linked to the User ID will be e-Delivered.

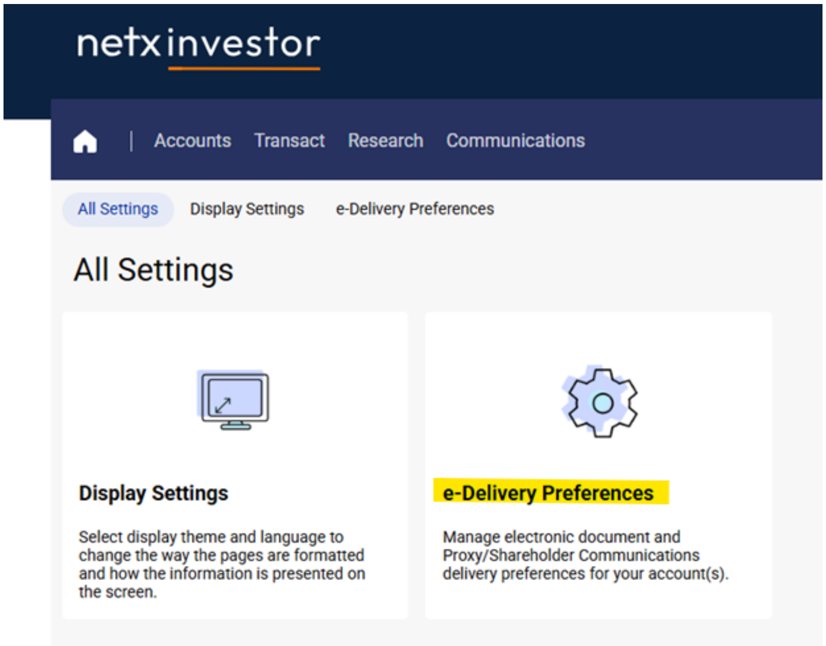


3. If you would not like all documents e-Delivered or if you miss this pop-up, there is another option to set up e-Delivery. Select the settings icon in the top right of the page.

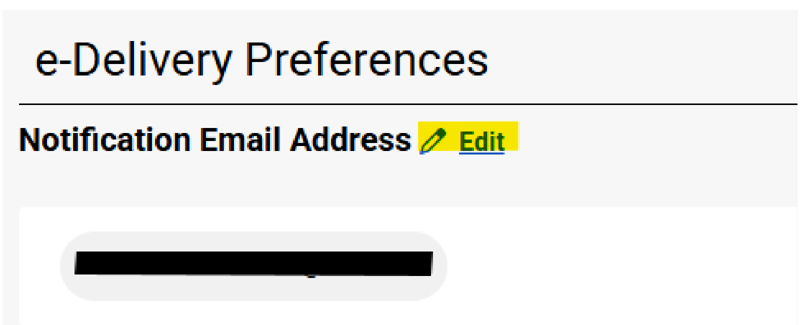
4. Select **All Settings**.



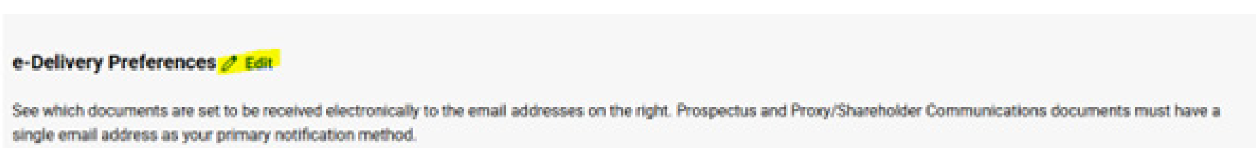
5. Select **e-Delivery Preferences**.



6. Under Notification Email Address, verify your email address is correct. If it needs to be updated, select **Edit**, update your email address, and select **Ok**.

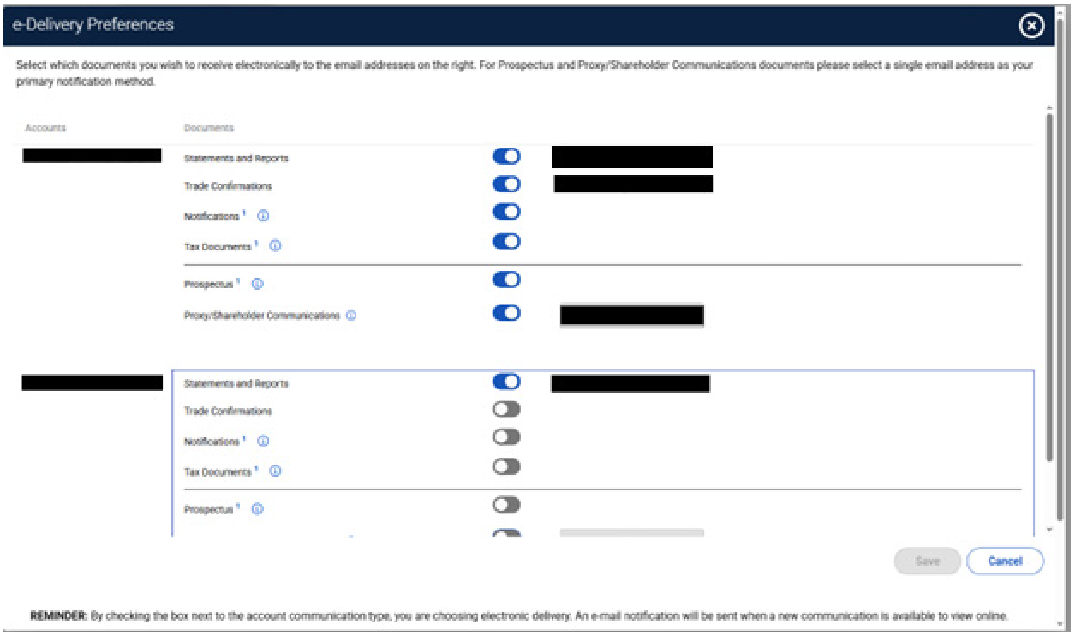


7. Select **Edit** by e-Delivery Preferences to set up different preferences for each account and document.



If the toggle is activated e-Delivery is on.

If the toggle is not activated e-Delivery is off and will receive paper statements via U.S. Mail.



8. Once the changes have been made, select **Save**.

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