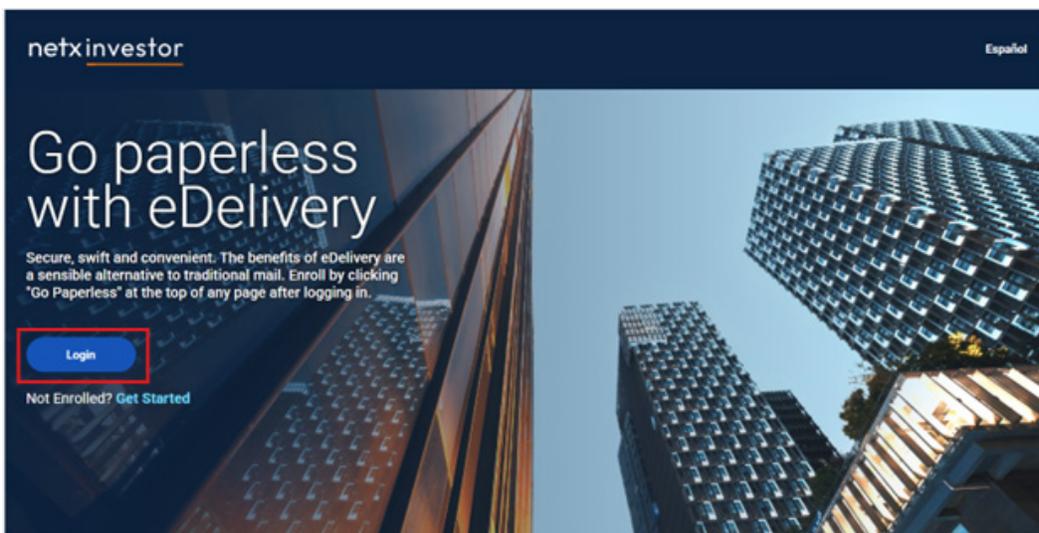


NETXINVESTOR: HOW TO SET UP E-DELIVERY

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.



Login

Financial Organization # * ⓘ

User ID or email address *

Password *

* Required

 Remember User ID

First time user?

NetXInvestor provides you with online access to your investment accounts, night and day, seven days a week. Sign up today to access your account online.

[Get Started](#)

[Check firm's background on BrokerCheck](#)

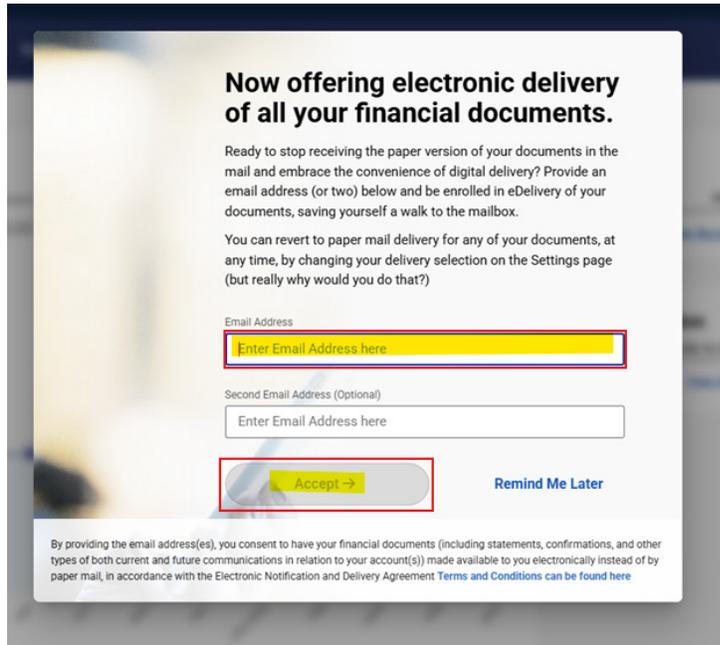
[Login](#)

[Forgot User ID?](#) [Forgot Password?](#)

This information is provided by NetXInvestor through Pershing LLC, Member FINRA, NYSE, SIPC. Brokerage services provided by Pershing LLC and Pershing Advisor Solutions LLC, Member FINRA, SIPC. Bank custody services provided by BNY Mellon, National Association, Member FDIC. Pershing LLC and its affiliates are subsidiaries of The Bank of New York Mellon Corporation. Pershing LLC, Pershing Advisor Solutions LLC and BNY Mellon, National Association Bank Custody Solutions do not provide investment, legal or tax advice. Investing involves risk, including the possible loss of principal invested. Past performance is no guarantee of future results. Affiliated investment advisory services, if offered, are provided by BNY Mellon Advisors, Inc., an investment advisor registered in the United States under the Investment Advisers Act of 1940. BNY, BNY Pershing, BNY Mellon and Bank of New York Mellon are the corporate brands of The Bank of New York Mellon Corporation and may be used to reference the corporation as a whole and/or its various subsidiaries generally.

INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC, ARE NOT DEPOSITS AND MAY LOSE VALUE.

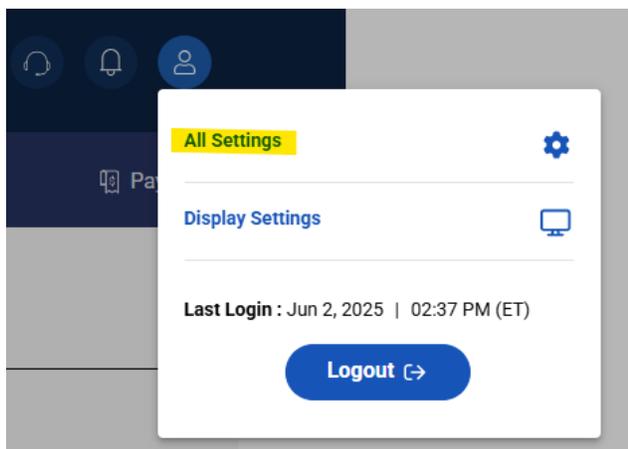
2. Once logged in, you may receive a pop-up that states “Now offering electronic delivery of all your financial documents.” If you would like all documents to be e-Delivered, put your email address in the first email address field. You may add a secondary email address if you would like, but it is not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



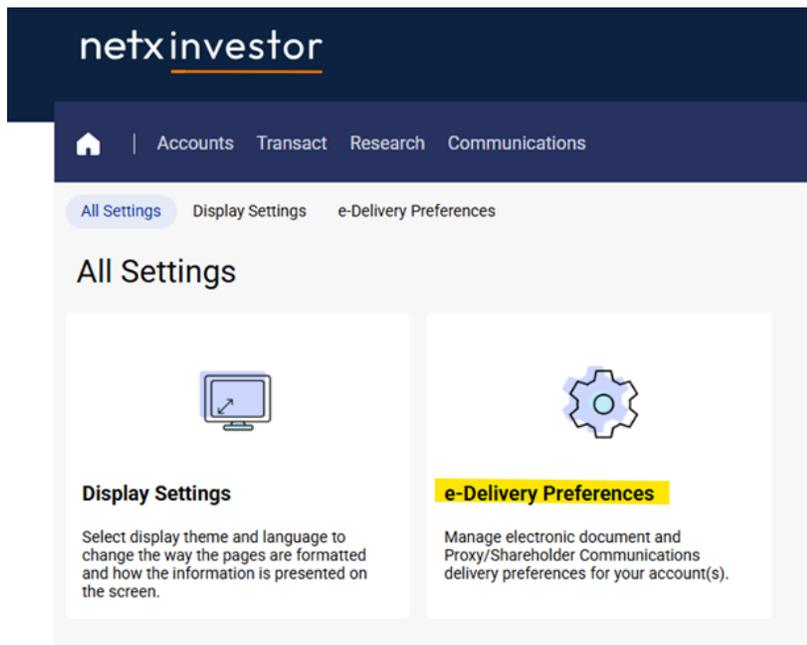
3. If you would not like all documents e-Delivered or if you miss this pop-up, there is another option to set up e-Delivery. Select the settings icon in the top right of the page.



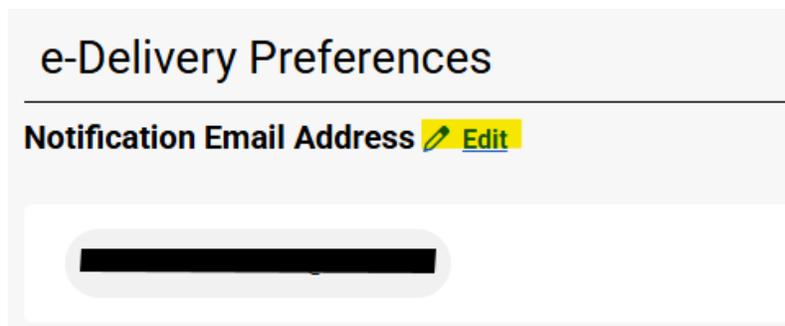
4. Select **All Settings**.



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.

e-Delivery Preferences ✕

Select which documents you wish to receive electronically to the email addresses on the right. For Prospectus and Proxy/Shareholder Communications documents please select a single email address as your primary notification method.

Accounts	Documents		
[Redacted]	Statements and Reports	<input checked="" type="checkbox"/>	[Redacted]
	Trade Confirmations	<input checked="" type="checkbox"/>	[Redacted]
	Notifications ¹ ⓘ	<input checked="" type="checkbox"/>	
	Tax Documents ¹ ⓘ	<input checked="" type="checkbox"/>	
	Prospectus ¹ ⓘ	<input checked="" type="checkbox"/>	
	Proxy/Shareholder Communications ⓘ	<input checked="" type="checkbox"/>	[Redacted]
[Redacted]	Statements and Reports	<input checked="" type="checkbox"/>	[Redacted]
	Trade Confirmations	<input type="checkbox"/>	
	Notifications ¹ ⓘ	<input type="checkbox"/>	
	Tax Documents ¹ ⓘ	<input type="checkbox"/>	
	Prospectus ¹ ⓘ	<input type="checkbox"/>	

Save Cancel

REMINDER: By checking the box next to the account communication type, you are choosing electronic delivery. An e-mail notification will be sent when a new communication is available to view online.

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



For questions, contact the Digital Experience, Technology Access and Support Team at 1-855-557-4030, option 6.

1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080

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