

## eDelivery Enrollment

Stifel Wealth Tracker allows you to easily and conveniently select how you would like to receive Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices. The Delivery section of our Account Settings tab allows you to select whether you would like to receive these important documents in an all-paper format or electronically via e-mail. You can also customize your preferences by either document type or set specific preferences for any or all of your accounts.

1. Log in to your Stifel Wealth Tracker account. Select Settings, Account Settings, then select the Delivery tab.

The screenshot displays the Stifel Wealth Tracker interface. On the left is a dark blue navigation sidebar with the Stifel Wealth Tracker logo at the top. The sidebar contains a list of menu items: Home, Move Money, Manage Stifel Cards, Bank with Stifel, Research & News, Manage Accounts, My Financial Advisor, My Documents, Settings (highlighted with a red box), Profile, Account Settings (highlighted with a red box), Alerts, Alert Preferences, Security Preferences, Important Information, and Log Off. The main content area is titled 'Account Settings' and has four sub-tabs: Delivery (selected), Sharing, Nicknames, and Quicken. Below the tabs, the 'Delivery Method' section is visible, with a heading and a descriptive paragraph. Below the text are four radio button options: Paper Documents (selected), Email Delivery, Customized by Document, and Customized by Account. A 'Show Accounts' button is located below the radio buttons. At the bottom of the page, there is a section for 'Emails Delivered to' showing the email address 'valuedclient@email.com' and an 'Edit Profile' link. A final paragraph at the bottom provides information about document delivery preference elections.

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2. Within the **Delivery** tab, select how you want eligible document types delivered.

The *Delivery Method* options are:

- **Paper Documents:** Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices for all accounts will be delivered via mail.
- **E-Mail Delivery:** A notice will be delivered to the E-Mail address affiliated with the Stifel Wealth Tracker ID when a new Statement, Confirm, Tax Form, Shareholder Notice, or Other Notice is available to be viewed electronically.
- **Customized by Document:** Customize Paper or E-Mail Delivery for Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices which will be applied to all accounts. See additional details below.
- **Customized by Account:** Customize Paper or E-Mail Delivery for Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices for each account individually. See additional details below.

### Delivery Method

Remove the clutter from your mailbox by opting into email delivery of document notifications. By going paperless you have the option to no longer receive paper copies of these document types; Statements, Trade Confirms, Tax Forms, Shareholder Notices and Other Notices. ⓘ

Paper Documents

Email Delivery

Customized by Document

Customized by Account

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[Show Accounts](#)

### Customized by Document

Customize the delivery methods for each unique document type. The delivery method selected for **each unique document** type will be applied to **all accounts**.

The screenshot shows the 'Account Settings' page in the Stifel Wealth Tracker interface. The left sidebar contains navigation options, with 'Settings' and 'Account Settings' highlighted. The main content area is titled 'Account Settings' and includes tabs for 'Delivery', 'Sharing', 'Nicknames', and 'Quicken'. Under the 'Delivery Method' section, there is a description and four radio button options: 'Paper Documents', 'Email Delivery', 'Customized by Document' (which is selected and highlighted with a red box), and 'Customized by Account'. Below this, a table lists delivery preferences for five document types: Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices. Each type has two radio button options: 'Paper Documents' and 'Email Delivery'. The 'Email Delivery' option is selected for all five document types, and this entire table is highlighted with a red box. At the bottom of the page, it shows 'Emails Delivered to' as 'valuedclient@email.com' and an 'Edit Profile' link.

Document Type	Paper Documents	Email Delivery
Statements	<input checked="" type="radio"/>	<input type="radio"/>
Confirms	<input type="radio"/>	<input checked="" type="radio"/>
Tax Forms	<input checked="" type="radio"/>	<input type="radio"/>
Shareholder Notices	<input type="radio"/>	<input checked="" type="radio"/>
Other Notices	<input type="radio"/>	<input checked="" type="radio"/>

### Customized by Account

Set **each account's** unique delivery method individually. Select *Paper*, *E-Mail Delivery*, or *Customized by Document* for **each account** available for maximum customization.

The screenshot displays the 'Account Settings' page in the Stifel Wealth Tracker interface. The left sidebar contains navigation options, with 'Settings' and 'Account Settings' highlighted. The main content area is titled 'Account Settings' and includes tabs for 'Delivery', 'Sharing', 'Nicknames', and 'Quicken'. Under the 'Delivery' tab, the 'Delivery Method' section explains the benefits of email delivery and provides four radio button options: 'Paper Documents', 'Email Delivery', 'Customized by Document', and 'Customized by Account'. The 'Customized by Account' option is selected and highlighted with a red box. Below this, a 'Hide Accounts' section lists several accounts with their respective delivery methods: 'Future Accounts' (Email Delivery), 'Jane and John Doe' (Customized by Document), 'Jane Doe Debit Card' (Email Delivery), and 'New Joint Account' (Paper Documents). A table below the accounts lists delivery preferences for 'Statements', 'Confirms', 'Tax Forms', 'Shareholder Notices', and 'Other Notices', with 'Email Delivery' selected for all categories.

STIFEL | WEALTH TRACKER Welcome back, Good Morning, Valued Client

Home  
Move Money  
Bank with Stifel  
Manage Stifel Cards  
Research & News  
Manage Accounts  
My Financial Advisor  
My Documents  
**Settings**  
Profile  
**Account Settings**  
Alerts  
Alert Preferences  
Security Preferences  
Important Information  
Log Off

### Account Settings

Delivery | Sharing | Nicknames | Quicken

**Delivery Method**  
Remove the clutter from your mailbox by opting into email delivery of document notifications. By going paperless you have the option to no longer receive paper copies of these document types; Statements, Trade Confirms, Tax Forms, Shareholder Notices and Other Notices. ⓘ

Paper Documents  Email Delivery  Customized by Document  Customized by Account

Hide Accounts

**Future Accounts**  
Elections made here will automatically set delivery preferences for new accounts. Email Delivery

**Jane and John Doe**  
1111-2222 Customized by Document

Statements	Confirms	Tax Forms	Shareholder Notices	Other Notices
<input checked="" type="radio"/> Paper Documents <input type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery	<input checked="" type="radio"/> Paper Documents <input type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery

**Jane Doe Debit Card**  
3333-4444 Email Delivery

**New Joint Account**  
8888-1111 Paper Documents

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### Future Accounts

Select the Delivery Method that should be applied to future accounts you may open at Stifel. If you make no election in this field, the default delivery method will be Paper Documents. You can make changes to this election at any time.

The screenshot shows the 'Account Settings' page in the Stifel Wealth Tracker interface. The left sidebar contains navigation options, with 'Settings' and 'Account Settings' highlighted. The main content area is titled 'Account Settings' and includes tabs for 'Delivery', 'Sharing', 'Nicknames', and 'Quicken'. Under the 'Delivery' tab, the 'Delivery Method' section explains that users can opt into email delivery to reduce paper clutter. Below this, four radio button options are shown: 'Paper Documents', 'Email Delivery', 'Customized by Document', and 'Customized by Account'. The 'Customized by Account' option is selected and highlighted with a red box. Below this is a 'Future Accounts' section with a dropdown menu currently set to 'Customized by Document'. This dropdown menu is also highlighted with a red box and shows options for 'Paper Documents', 'Email Delivery', and 'Customized by Document'. At the bottom, there are four columns of delivery preferences for 'Statements', 'Confirms', 'Tax Forms', and 'Shareholder Notices', each with radio buttons for 'Paper Documents' and 'Email Delivery'.

### Questions?

Contact Stifel Wealth Tracker at **(866) 697-8433** or [wealthtracker@stifel.com](mailto:wealthtracker@stifel.com).

**Monday – Friday**

6:00 a.m. – 7:00 p.m. Central

**Saturday**

7:30 a.m. – 4:00 p.m. Central

Stifel Wealth Tracker allows you to easily and conveniently select how you would like to receive Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices. The Delivery section of our Account Settings tab allows you to select whether you would like to receive these important documents in an all-paper format or electronically via e-mail. You can also customize your preferences by either document type or set specific preferences for any or all of your accounts.

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2. Within the **Delivery** tab, select how you want eligible document types delivered.

The *Delivery Method* options are:

- **Paper Documents:** Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices for all accounts will be delivered via mail.
- **E-Mail Delivery:** A notice will be delivered to the E-Mail address affiliated with the Stifel Wealth Tracker ID when a new Statement, Confirm, Tax Form, Shareholder Notice, or Other Notice is available to be viewed electronically.
- **Customized by Document:** Customize Paper or E-Mail Delivery for Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices which will be applied to all accounts. See additional details below.
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### Delivery Method

Remove the clutter from your mailbox by opting into email delivery of document notifications. By going paperless you have the option to no longer receive paper copies of these document types; Statements, Trade Confirms, Tax Forms, Shareholder Notices and Other Notices. ⓘ

Paper Documents     Email Delivery     Customized by Document     Customized by Account

[Show Accounts](#)

### Customized by Document

Customize the delivery methods for each unique document type. The delivery method selected for **each unique document** type will be applied to **all accounts**.

The screenshot displays the 'Account Settings' page in the Stifel Wealth Tracker interface. The left sidebar contains navigation options, with 'Settings' and 'Account Settings' highlighted. The main content area is titled 'Account Settings' and includes tabs for 'Delivery', 'Sharing', 'Nicknames', and 'Quicken'. Under the 'Delivery Method' section, there is a descriptive text and four radio button options: 'Paper Documents', 'Email Delivery', 'Customized by Document' (which is selected and highlighted with a red box), and 'Customized by Account'. Below this, a table lists delivery preferences for five document types: Statements, Confirms, Tax Forms, Shareholder Notices, and Other Notices. Each type has two radio button options: 'Paper Documents' and 'Email Delivery'. The 'Email Delivery' option is selected for all five document types, and this entire table is also highlighted with a red box. At the bottom of the main content area, there is a 'Show Accounts' button. The footer of the page shows 'Emails Delivered to' as 'valuedclient@email.com' and an 'Edit Profile' link.

Document Type	Paper Documents	Email Delivery
Statements	<input checked="" type="radio"/>	<input type="radio"/>
Confirms	<input type="radio"/>	<input checked="" type="radio"/>
Tax Forms	<input checked="" type="radio"/>	<input type="radio"/>
Shareholder Notices	<input type="radio"/>	<input checked="" type="radio"/>
Other Notices	<input type="radio"/>	<input checked="" type="radio"/>



### Customized by Account

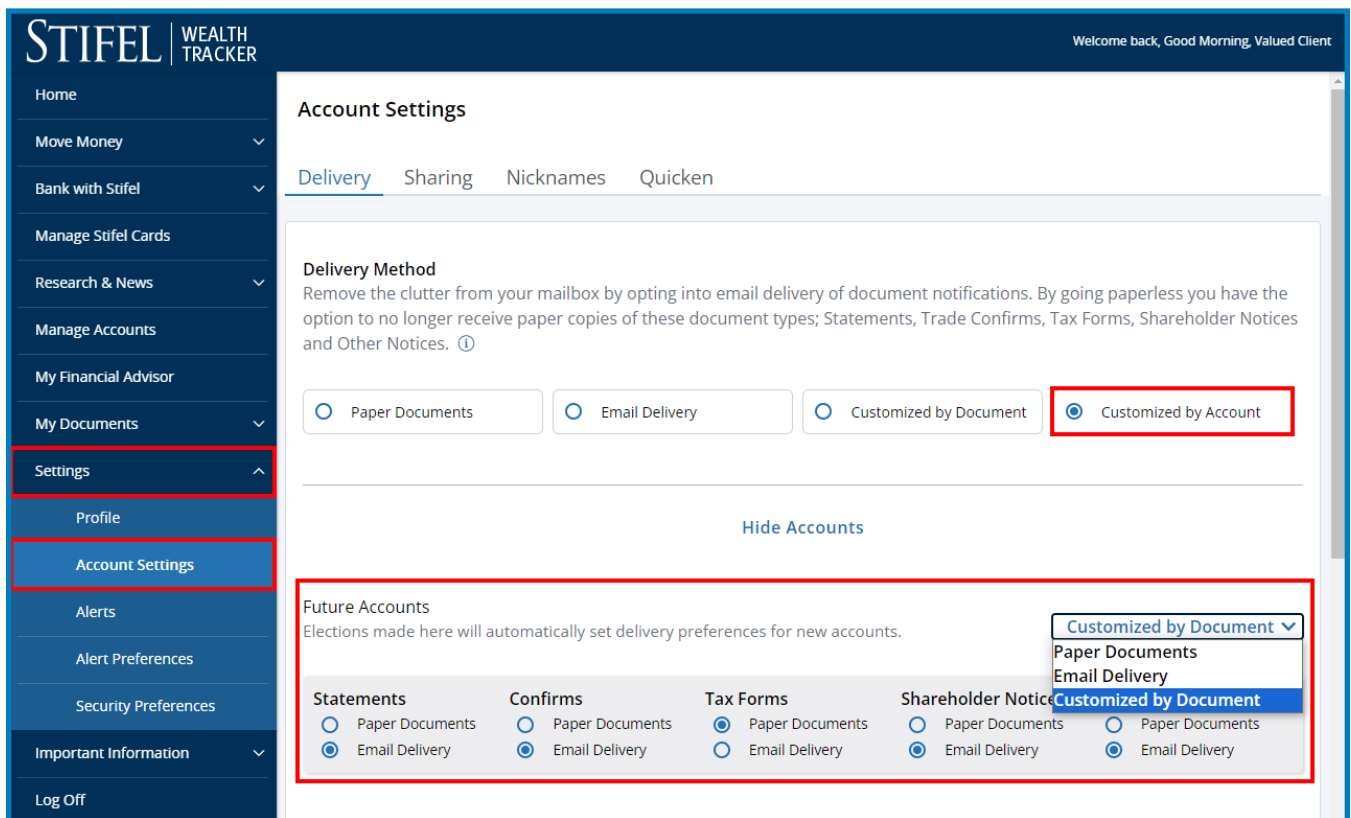
Set **each account's** unique delivery method individually. Select *Paper*, *E-Mail Delivery*, or *Customized by Document* for **each account** available for maximum customization.

The screenshot displays the 'Account Settings' page in the Stifel Wealth Tracker interface. The left sidebar contains navigation options, with 'Settings' and 'Account Settings' highlighted. The main content area is titled 'Account Settings' and includes tabs for 'Delivery', 'Sharing', 'Nicknames', and 'Quicken'. Under the 'Delivery' tab, the 'Delivery Method' section allows users to select a delivery preference: Paper Documents, Email Delivery, Customized by Document, or Customized by Account. Below this, there is a 'Hide Accounts' section and a 'Future Accounts' section with a dropdown menu set to 'Email Delivery'. A table lists delivery preferences for specific accounts, including 'Jane and John Doe' and 'Jane Doe Debit Card'. The 'New Joint Account' is also listed with a dropdown menu set to 'Paper Documents'.

Account Name	Statements	Confirms	Tax Forms	Shareholder Notices	Other Notices
Future Accounts	Elections made here will automatically set delivery preferences for new accounts.				
Jane and John Doe 1111-2222	<input checked="" type="radio"/> Paper Documents <input type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery	<input checked="" type="radio"/> Paper Documents <input type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery	<input type="radio"/> Paper Documents <input checked="" type="radio"/> Email Delivery
Jane Doe Debit Card 3333-4444	Email Delivery				
New Joint Account 9999-1111	Paper Documents				

### Future Accounts

Select the Delivery Method that should be applied to future accounts you may open at Stifel. If you make no election in this field, the default delivery method will be Paper Documents. You can make changes to this election at any time.



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