STIFEL

E-DELIVERY OF TAX FORMS

Enrolling in E-Delivery of Tax Forms provides our clients with several benefits:

- Allows faster access to this time-sensitive information, eliminating mail delays.
- Stifel will notify you via e-mail as soon as forms are available online, so you will have immediate access.
- If you use TurboTax® or H&R Block® to prepare your return, you can save the Tax Return on your computer with the PDF of your 1099 supporting documentation.
- If your Form 1099 is pending information from the issuers of your investments, your "1099 Preliminary Statement" will be available for E-Delivery ONLY. You will receive another e-mail when the Final Form 1099 is available.

Sign Up for E-Delivery of Tax Forms:

1. Clients can log in to their Stifel Wealth Tracker account. If you are not currently signed up for Wealth Tracker, you may create a login by going to www.stifelwealthtracker.com and selecting **Sign Up**.
2. Select **Document Center** from the left-hand navigation Menu. Next select **Delivery Preferences** and **Custom by Category**, then change the delivery method to E-Mail Delivery for tax forms. Clients must change this election; neither the home office nor the branch can make document delivery changes on behalf of a client. Stifel will continue to mail the following forms to our clients: 2439 and 480.6 (A-D).

If you elect to receive Tax Forms electronically and would like to receive a paper copy of Form 1099, without electing out of E-Delivery, please contact your Financial Advisor.

If Stifel receives a bounce back for an undeliverable e-mail address, Stifel will automatically switch all accounts back to paper. If this takes place, a letter will be sent notifying you of this change. You will be required to re-enroll in E-Delivery if you receive one of these letters.

Please contact your Financial Advisor or Stifel Wealth Tracker Support at (866) 697-8433 or WealthTracker@stifel.com if you have any questions or need additional assistance signing up for E-Delivery.

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