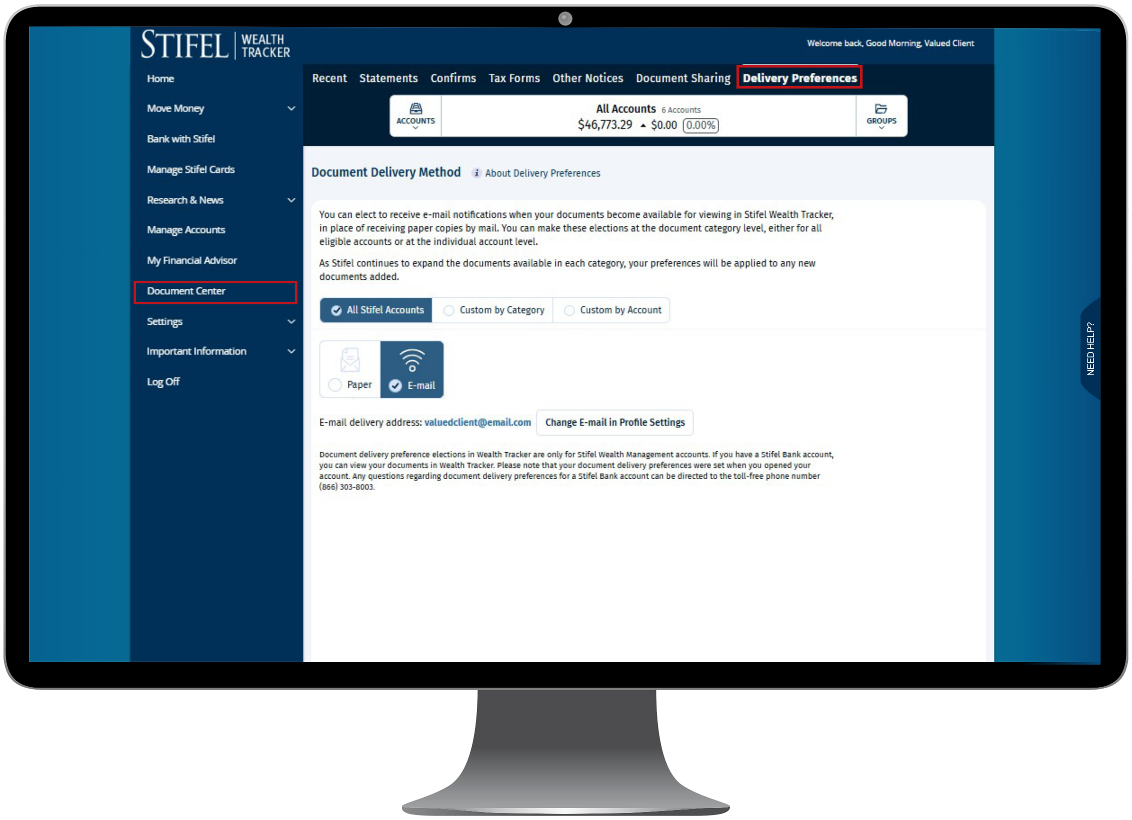
STIFEL
WEALTH TRACKER

Delivery Preferences

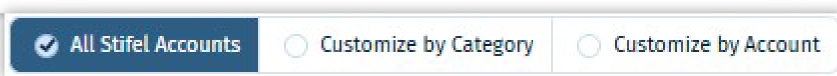
Easily and conveniently select how you would like to receive statements, confirms, tax forms, shareholder notices, advisory notices, and other notices.

Choose to receive important documents in an all-paper format or electronically via e-mail. You can also customize your preferences by category type or set specific preferences for any or all your accounts.



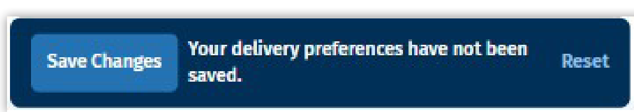
1 Navigate to the **Document Center**, then select **Delivery Preferences** from the top navigation.

2 Within **Delivery Preference**, select your Delivery Method for receiving eligible document types.



3 In your preferred Delivery Method, select how you want to receive eligible document categories for statements, confirms, tax forms, shareholder notices, advisory notices, and other notices.

After selecting your preferred Delivery Method, a confirmation window will appear confirming that you would like to **Save Changes** or **Cancel**.



Delivery Election Choices

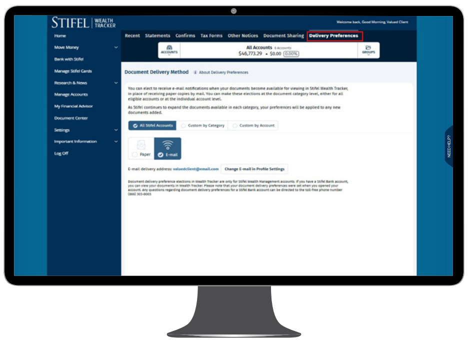
Paper Documents: To be delivered via mail at the address on record for that account.

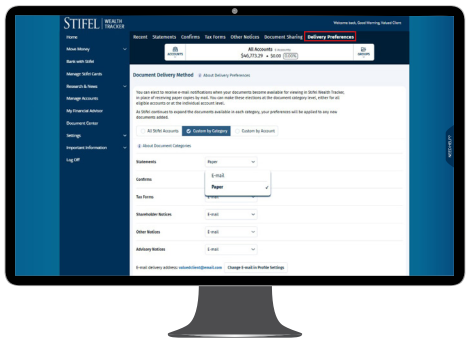
E-mail Notices: We'll notify you at the e-mail address affiliated with the Stifel Wealth Tracker ID when your documents are available to be viewed electronically.

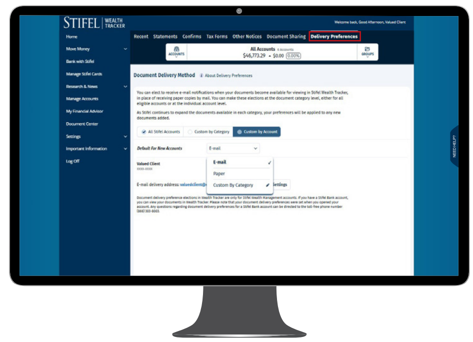
Customized by Category: Customize Paper or E-mail Delivery. The customized delivery method selected for **each unique document** type will be applied to **all accounts**.

Customized by Account: Set **each account's** unique delivery method individually. Select Paper Documents, E-mail Delivery, or Customized by Category for **each account** available for maximum customization.

Future Accounts: Select the Delivery Method to be applied to any future accounts you open at Stifel. If you do not make an election in this field, the default delivery method will be Paper Documents. You can change this election at any time.







Questions?

Contact Stifel Wealth Tracker at (866) 697-8433 or wealthtracker@stifel.com.

Monday – Friday
6:00 a.m. – 7:00 p.m. Central

Saturday
7:30 a.m. – 4:00 p.m. Central

Log In Now!
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One Financial Plaza | 501 North Broadway | St. Louis, Missouri 63102
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