Online Access and Electronic Delivery Form

Financial Organization Name

You may use this form to:

- Create a User ID and temporary password for online access
- Link additional accounts to an existing User ID
- Provide instructions to establish electronic delivery (e-delivery) of brokerage account communications
- Change delivery instructions for accounts linked to an existing User ID

YOUR FINANCIAL ORGANIZATION WILL PROVIDE YOU WITH THE NAME OF THE WEBSITE THROUGH WHICH YOU WILL ACCESS YOUR ACCOUNTS.

STEP 1. ACCOUNT OWNER INFORMATION

Primary Account Owner Name	
Mother's Maiden Name	Account Owner's Date of Birth — —
Email address	
If You Have an Existing User ID, Please Provide it Here	

ALL FIELDS ARE REQUIRED.

ONE VALID EMAIL ADDRESS MUST BE PROVIDED FOR DELIVERY OF NOTIFICATION EMAILS.

NOTICES RELATED TO ONLINE ACTIVITY MAY BE SENT TO THIS EMAIL ADDRESS.

If you are requesting a new User ID, indicate your first and second choices below. User IDs must have a minimum of 7 and maximum of 15 characters, are NOT case sensitive, and should consist of letters and numbers only.

User ID Desired (first choice)	User ID Desired (second choice)

STEP 2. ACCOUNT INFORMATION AND CONSENT TO ELECTRONIC DELIVERY

Please provide information regarding the accounts you wish to view online. When you elect to receive electronic delivery of brokerage account communications as outlined below, you will no longer receive paper copies via postal mail. If you elect to receive proxy communications via e-delivery, you must choose a four-digit PIN and write this number in the space provided below. You must read and agree to the Electronic Delivery Agreement in Step 3 and sign in Step 4.

For U.S. accounts, the Social Security number of the primary account holder listed in Section II must be affiliated, either as an account owner or participant, on the account numbers provided below. If the primary account holder above is not an owner on all accounts listed below, each account owner must sign in Step 4.

IF YOU ARE LINKING MORE THAN FIVE ACCOUNTS, PLEASE ATTACH ADDITIONAL ACCOUNT INFORMATION.

	ACCOUNT ACCESS ONLY	ELECTRONIC DELIVERY[1]					
	Link to Primary Account	Account Statements	Trade Confirmations	Account Notifications[2]	Quarterly Performance Reports[3]	Proxy and Shareholder Communications (PIN required)[4]	
Primary Account Number —		☐	☐	☐	☐	☐	PIN
Account Number —	☐	☐	☐	☐	☐	☐	PIN
Account Number —	☐	☐	☐	☐	☐	☐	PIN
Account Number —	☐	☐	☐	☐	☐	☐	PIN
Account Number —	☐	☐	☐	☐	☐	☐	PIN

[1] Tax documents are also available via electronic delivery; however, enrollment must be done online by the account owner. Please contact your financial organization for assistance.

[2] Please contact your financial organization for a list of the specific notifications eligible for electronic delivery.

[3] Please contact your financial organization to confirm availability of Quarterly Performance Reports for your account(s).

[4] A four-digit PIN is required for electronic delivery of proxy communications. For managed accounts, changes to delivery preferences for proxy and shareholder communications may need to be initiated by your advisor or money manager.

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STEP 3. INVESTOR TERMS AND CONDITIONS

Electronic Delivery Terms and Conditions

"You" means the account owner(s) of the account.

"Account Communications" means account statements, trade confirmations or other notices, disclosures and other information related to your account including without limitation prospectus, quarterly, semi-annual or annual shareholder reports, proxy statements, and legal and regulatory notices and documents.

"Authorized User" means a person that you have authorized to be provided a user ID which enables access to your account online.

You agree that your financial organization and your clearing broker Pershing LLC (Pershing) may make the account communications available in an electronic form as described herein instead of mailing them in paper form.

Account communications will be made available to you online via a website maintained by Pershing on behalf of your financial organization (the "website"). Account communications will be available in portable document format (PDF). You affirm that you have installed a recent version of Adobe Acrobat Reader or other software application that enables you to view and print your account communications. You may print or save a copy of any of the account communications at any time. You may request a mailed copy of any of your account communications by contacting your financial organization.

An electronic mail ("e-mail") notification will be sent when account communications are available to be accessed on the website. The e-mail will provide you with the URL of the website. The e-mail notification(s) will be sent to the e-mail address(es) you provided directly to your financial organization or provided by registering on the website. You may view and verify your e-mail address(es) via the website, and change the e-mail address(es) through the website or by contacting your financial organization.

In the event of an e-mail notification failure as defined by Pershing, Pershing may discontinue electronic delivery and mail your account communications in paper form until you re-enroll through the website. If you lose access to the website, you should contact your financial organization to have your access reinstated. By providing this Electronic Delivery Consent, you affirm that you have provided a valid e-mail address directly to your financial organization or by registering on the website, have access to the Internet and are at least 18 years of age. You agree that electronic delivery of the account communications is deemed accepted, regardless of whether you access or view a particular account communication document. You acknowledge that any authorized users for your account are able to make changes to the electronic delivery settings for your account, and you agree to accept responsibility for such changes.

This Electronic Delivery Consent is effective until revoked. You may revoke your consent and resume receiving paper account communications by changing your delivery preferences by following the instructions on the website, or by contacting your financial organization directly for assistance.

Website Access Terms and Conditions

"You" means the account owner(s) of the account.

"Authorized User" means a person that you have authorized to be provided an additional user ID which enables access to your account online.

"Website" means the website maintained by Pershing LLC on behalf of your financial organization that enables you to access your account information and perform other activities.

You expressly agree and acknowledge that your use and any authorized users' use of the website is subject to the terms and conditions of use that are posted on the website, including without limitation any disclaimers of warranties and other notices therein. Such terms and conditions may be amended from time to time by posting them on the website. Continued use of the website by you or your authorized users will constitute your acceptance of the then-current terms and conditions.

You agree that you are solely responsible for: (a) safeguarding and keeping confidential your password and user IDs that you and your authorized users use to access the website and any information that is retrieved from the website. You agree that you and your authorized users will only access the website from devices with industry standard anti-virus/anti-malware protection. You agree to accept responsibility for all activities that occur under such user ID(s) or password(s).

You agree to immediately notify your financial institution if: (i) the passwords or user IDs are lost or stolen, or (ii) you become aware of any unauthorized use of the passwords, user IDs, or access to your accounts that may be related to your use of the website. You agree that the providers of the website are not liable for any loss or damage arising from any activity that occurs via the use of your password and/or user ID.

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STEP 4. SIGNATURES

By signing below you represent that you have read and understand Step 3, Investor Terms and Conditions.

EACH ACCOUNT OWNER MUST SIGN THIS FORM.

Primary Account Owner

Print name	Date
Signature X	

Additional Account Owner

Print name	Date
Signature X	

Additional Account Owner

Print name	Date
Signature X	

Additional Account Owner

Print name	Date
Signature X	

FOR OFFICE USE ONLY

Provide Access to:

☐ EDELIVERY/Myedocumentsuite.com ☐ DEFAULT/NetXInvestor ☐ Other Profile:

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