

Reasons to Go Paperless

See Your Statements and Confirmations in Investor360®

Eliminate the clutter associated with multiple account mailings and simplify your view of various account documents including statements, confirmations, tax forms, shareholder reports, and correspondence.

The benefits of paperless delivery include:

- Immediate notification and access from any device
- Improved record access
- Enhanced security and reduced liability
- Eco-friendly

Setting Up Paperless Option



If a pop-up window appears

Click [Sign Up](#) after reading the benefits and terms and conditions in the [Go Paperless](#) dialog box (Image 1).

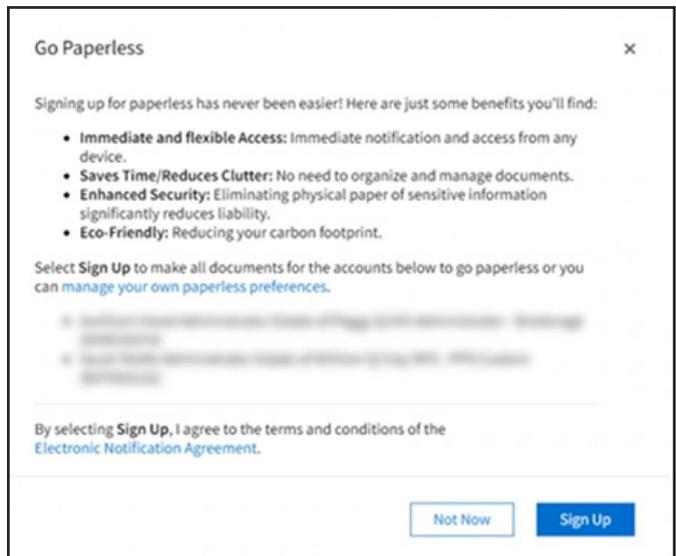


Image 1



Williams Asset Management
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410.740.0220 | www.williamsassetmanagement.com



If you don't see a pop-up window

1. Go to the Welcome menu and select Paperless Preferences (Image 2).
2. For each account (Image 3), enter the account holder and their email address for paperless delivery. Either click **Select All** or choose specific document types you would like to receive electronically.
3. Click **Save** (Image 3).

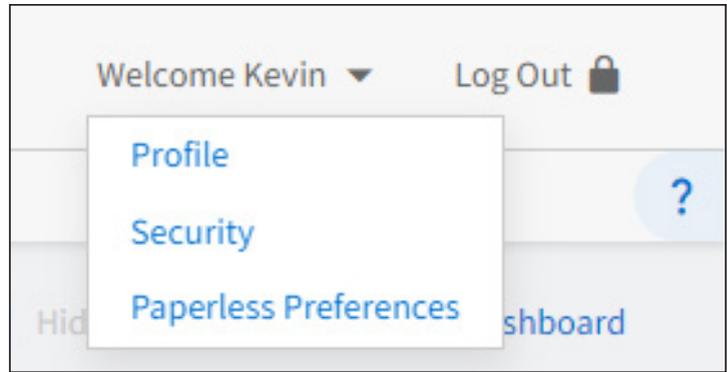


Image 2

ACCOUNT	DOCUMENT TYPE	POSTAL DELIVERY	E-DELIVERY
Melissa's IRA	Confirms	Select All	Select All
	Customer Correspondence	<input type="radio"/>	<input checked="" type="radio"/>
	Tax Documents	<input type="radio"/>	<input checked="" type="radio"/>
	Statements	<input type="radio"/>	<input checked="" type="radio"/>
	Shareholder Reports	<input type="radio"/>	<input checked="" type="radio"/>
Melissa's Individual	Confirms	Select All	Select All
	Customer Correspondence	<input type="radio"/>	<input checked="" type="radio"/>
	Tax Documents	<input type="radio"/>	<input checked="" type="radio"/>
	Statements	<input type="radio"/>	<input checked="" type="radio"/>
	Shareholder Reports	<input type="radio"/>	<input checked="" type="radio"/>
Sean's Individual	Confirms	Select All	Select All
	Customer Correspondence	<input type="radio"/>	<input checked="" type="radio"/>
	Tax Documents	<input type="radio"/>	<input checked="" type="radio"/>
	Statements	<input type="radio"/>	<input checked="" type="radio"/>
	Shareholder Reports	<input type="radio"/>	<input checked="" type="radio"/>

Image 3

Questions?

If you need help setting up paperless delivery, please give us a call. We'd love to help you decrease clutter and improve productivity.



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