



## How to Request electronic documents for your Brokerage Account

- After logging in to your account on Wealthscape Investor (<https://investor.wealthscape.com>), click on the blue “Enroll Now” link on the bottom left of the screen under Go Paperless. Alternatively, you can click on the Service Tab, on the top right and select “Document Delivery Instructions” from the menu. Both will bring you to the same page.

**Click either the “Enroll Now” link OR go to Service> Document Delivery Instructions**

**Go Paperless**  
Enroll in electronic delivery for all of your accounts.  
We'll send you an e-mail alert when your financial documents (e.g., statements and confirms) are available to view online.  
[Enroll Now](#)

**FORMS & INSTRUCTIONS**  
[Document Delivery Instructions](#)

- A new window will pop up with your options for each account you have registered. Highlight the first account and select Electronic Delivery for each type of document you would like to receive electronically. Click Save this Account and then I agree. Repeat for each account.

**Document Delivery Instructions**

Rather than sending paper-based mail, we will send you an e-mail alert when your financial documents are available to view online.

Select and save each account separately

Traditional IRA (IRA) - 0N	Enrolled
Trust - Under Agreement (TRUA) - 0N	Enrolled

E-Mail Address\* [\[Redacted\]](#) E-Mail

**Document Delivery Instructions**  Set all documents to electronic delivery

Confirms/Confirming Prospectuses	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Statements & Regulatory Inserts	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Eligible Customer Correspondence	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Shareholder Reports (including Prospectuses) & Other Documents	<input checked="" type="radio"/> Electronic Delivery	<input type="radio"/> U.S. Mail
Tax Forms & Related Disclosures	<input type="radio"/> Electronic Delivery	<input checked="" type="radio"/> U.S. Mail

Selecting either option above will still allow you to access your documents online.

Close

**You can change your notification email address here**

**Check your preference for each type of document or check this box to request all docs be delivered electronically.**

**You will receive an email alerting you when electronic documents become available.**