

# Make a Powerful Choice

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Experience the freedom



Many investors enjoy the convenience, security and “anywhere access” made possible by accessing their accounts online.

Now, we’ve made it easy for you to go paperless—with just a few clicks of the mouse, you can eliminate paper brokerage account statements and trade confirmations. Instead of receiving paper copies, you can view them online as soon as they are available.

## The Choice is Yours

You decide how you want to receive your documents—electronically or in paper form. If you change your mind, it's easy to update your preferences. Going paperless has many advantages:



**Safety and Security.** Reduce the risk of identity theft and protect your personal information by eliminating paper delivery of sensitive financial information



**Anytime, Anywhere Access.** Enjoy instant access to your documents from any computer, at any time, anywhere in the world<sup>1</sup>



**Centralized Recordkeeping.** Reduce clutter at home and view account statements, trade confirmations and tax documents together online



**Convenience and Flexibility.** Enjoy the ability to access, download, print and e-mail your documents at any time



**Environmentally Friendly.** Reduce your paper consumption and make a responsible, environmentally-friendly choice

## Getting Started is Quick and Easy

Going paperless is an easy process. Just follow these simple steps:

### Step 1

Log in to your NetExchange Client<sup>®</sup> account<sup>2</sup>. Click on the “Go Paperless” button at the top of the screen.

The screenshot displays the NetExchange Client web application. At the top, the 'Go Paperless' button is highlighted with a green circle. Below the navigation bar, the 'Balances' section shows account details for 511000000. The 'Key Values' table lists various account metrics, all showing \$0.00 except for the 'Total Account Value' which is \$6.00. The 'Market Indices' section shows a line graph for the NASDAQ Composite.

Key Values	
Long Market Value <sup>1</sup>	\$0.00
Short Market Value	\$0.00
Securities Owed <sup>2</sup>	\$0.00
Money Fund Balance	\$0.00
Cash	\$0.00
Net Worth	\$0.00
Total Annuity Value <sup>3</sup>	\$0.00
Total Account Value	\$6.00

Step 2

Your document delivery preferences default to paper. Click *Change* to choose electronic delivery.

Document Delivery Preferences				
Account#	Statements	Effective Date	Confirmations	Effective Date
511000000	Online	08/18/2008	Online	05/21/2008

Change

Click the Change button to modify your delivery preferences. You may choose to turn off paper and view account statements and trade confirmations online. Viewing documents online is safe, secure and environmentally friendly. If you choose to view documents online, you will be notified by e-mail whenever a new account statement or trade confirmation is available. You can elect to paper at any time. See [Terms and Conditions](#) for details.

Step 3

Click on *Add E-mail Address* to enter one or more e-mail addresses.

Account Profile   User Profile   Account Groups   Document Delivery

There is no e-mail address associated with this account. Please add the e-mail address before editing the Document Preferences.

Add E-mail Address

Cancel

Enter your e-mail address in both fields, then click *Save*. When new documents are available to view, you will receive an e-mail notification at the e-mail address(es) you entered.

Account Profile   User Profile   Account Groups   Document Delivery

Add E-mail

New E-mail Address:

Retype New E-mail Address:

Save

Cancel

Step 4

Select *Online* for the documents you no longer wish to receive in paper form. Changes you make to your delivery preferences will be reflected on the Document Delivery screen. When you're finished, click *Continue*.

Document Delivery Preferences			
Account#	Statements	Confirmations	E-mail Addresses
511000000	<div><div>Online</div><div>Paper</div></div>	<div><div>Online</div><div>Paper</div></div>	TEST@PERSHING.COM*

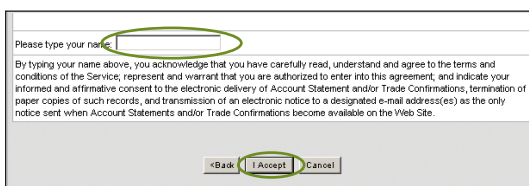
Continue

Cancel

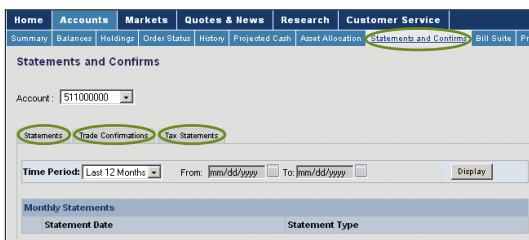
## Step 5

In the last step, you will see the Document Delivery Terms and Conditions. Please read these terms and conditions, enter your name where indicated, and click *I Accept*.

That's all it takes.



Once you have changed your delivery preferences to eliminate paper documents, you will receive an e-mail notification whenever a new statement or trade confirmation is available to view online. To view the document, simply log in to NetExchange Client and select *Statements and Confirms* from the top menu. You can view your account statements and trade confirmations for the time period you specify.<sup>3</sup>



Please contact your investment professional if you have any questions about NetExchange Client or need assistance with the log in or enrollment process.

Make a powerful choice to go online and go paperless today.

<sup>1</sup> Subject to system availability.

<sup>2</sup> If you need assistance with a NetExchange Client user ID, please contact your investment professional.

<sup>3</sup> Statements are securely stored for 10 years, trade confirmations for 3 years.

