

Why e-Delivery?

A more convenient, Secure and Flexible way of receiving Important Communications.

As an investor with accounts held at BNY Mellon | Pershing, you can choose to enroll in e-Delivery and access investment account information electronically. It is a simple, safe and convenient way to receive financial account communications and view statements, trade confirmations and tax documents through an online, password-protected portal.

Historical data is available from the day of initial signup¹ and the reduction of paper clutter not only helps you be more organized, it also shrinks your carbon footprint.

WHAT CAN e-DELIVERY OFFER?



Convenience Access, download, print and email account communications from any computer with internet access and applicable PDF software.



Increased Security Access account communications in a password-protected environment, eliminating paper delivery of sensitive financial information and reducing the risk of identity theft.



Centralized Record Keeping Eliminate the clutter of extra paper at home and quickly search online for the account communications you are looking.



Paper Free Prospectuses Download and review prospectuses and other important fund information.

HOW TO GET STARTED

To enroll in e-Delivery, log in to your account through NetXInvestor®, select “Go Paperless” at the top of any page and follow the on-screen prompts for setup. Enrollment can be activated as quickly as the same day as registration (if enrollment occurs prior to 6 p.m. ET).

For more information about Pershing’s e-Delivery solutions, contact your financial advisor.

WHAT IS e-DELIVERY?

With electronic delivery (e-Delivery), investors can choose online access to account communications. You will receive an email notifying you that new documents are available rather than through traditional mail delivery. This service is available for the account communications such as:

- Statements and reports
- Trade confirmations
- Tax documents
- Notifications and Letters
- Quarterly Performance Reports²
- Proxy material, reorganization material, and shareholder communications
- Trade-confirming prospectuses for mutual funds, exchange-traded funds and unit investment trusts³

¹ Statements are available for 10 years, trade confirmations for six years and tax documents for seven years

² Not applicable to all investors

³ Not supported by all firms