

# Going Digital

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## ***Suggested language to help engage your firm and clients.***

Dear [NAME],

During these unprecedented times, where we are all working differently, there are a number of digital tools offered through Pershing you can use to help you seamlessly conduct your business and serve your clients.

Many investors are already comfortable with doing personal business online. It is both convenient and environmentally friendly. Investors may also be seeking the same electronic access to their investment statements and other important financial information.

Pershing's e-Delivery provides access to investment account information electronically, and is a simple, safe and convenient way for investors to receive financial account communications. Enrolled investors receive a notification when new documents are available online. That email contains a link to which they can view—among other documents—statements, trade confirmations and tax documents through an online, password-protected portal.

[Click here](#) or contact me for more information or a complete list of documents available through e-Delivery.

All my best,

[INSERT EMAIL SIGNATURE]

