

Going Digital

Suggested language to help engage your firm and clients.

Dear [NAME],

I hope you are well and safe. In this unusual time where many businesses are performing duties digitally, I want you to know that I'm here to help.

As an investor with accounts held at Pershing, I encourage you 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.

In addition to the important features outlined below, enrolling in e-Delivery also shrinks your carbon footprint.

- **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.
- **Paperless Prospectuses:** Download and review prospectuses and other important fund information.

To enroll, 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 you would like to learn more about this, or have other items you would like to discuss, please call me at XXX-XXX-XXXX.

All my best,

[INSERT ADVISOR EMAIL SIGNATURE]

