

# Updating document delivery preferences

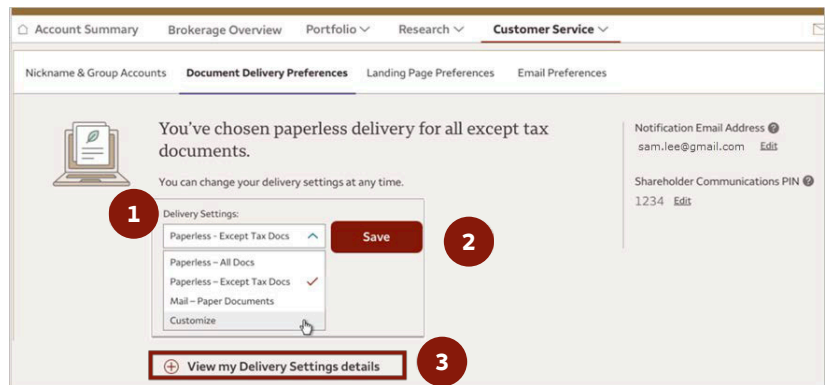
When you view your Wells Fargo Advisors accounts on Access Online, you can update the document delivery preferences you set during online enrollment at any time.

With Paperless delivery, you get electronic notifications as soon as your important documents are available. You can reduce paper clutter and still have access to your documents for seven years--as long as you have at least one open account to keep online access active.

## Selecting document delivery preferences

Navigate to the “Customer Service” tab in Access Online and select **Document Delivery Preferences**.

1. Select a preference under “Delivery Settings.”
  - Choose **Paperless – All docs** to switch to all electronic documents and suppress paper mailings.
  - Choose **Paperless, Except Tax Docs** to switch to all electronic documents, except for tax documents.
  - Choose **Mail – Paper Documents** to switch to all paper documents.
  - Choose **Customize** to select a mix of delivery preferences. The delivery preference screen expands, allowing you to set your document delivery preferences by individual account and document type.



**Note:** For accounts with multiple owners, the most recent change by any account owner overrides all previous selections.

2. Select **Save**.
3. Select **View/Hide my Delivery Settings details** to easily view delivery preferences at the individual account level at any time.

### Investment and Insurance Products:

- Not Insured by the FDIC or Any Federal Government Agency
- Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate
- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested

## Customizing delivery preferences

After clicking **Customize** to select delivery preferences for individual accounts, or **View/Hide my Delivery Settings details** to view your delivery preferences, the “My Account Documents” section expands.

A. Check box—A checkmark indicates paperless delivery; an unchecked box indicates paper delivery.

B. Easy-set row—The boxes along the top row function as an easy button for that column. Check the box to go paperless for that document type on all accounts.

**Note:** This easy button also ties into new accounts you open in the future. If checked, your future account will default to paperless delivery. If unchecked or customized by account, you will default to paper delivery for future accounts opened.

C. Informational icon—Look for any blue icons, as these show when there are additional notes on eligibility and account ownership. Select on the icon to see the explanation.

D. You can select **Reset** to change the checkboxes back to the previously saved preferences. Or select **Save** to keep your updates. You’ll see a confirmation message when you successfully save changes.

For shareholder communications, you may additionally see:

- Set PIN prompt: If you are the first to update these preferences, you will be prompted to choose a shareholder PIN.
- Orange caution icon: Note that these delivery preferences work a bit differently—they’re driven by a client’s ability to vote for any equity shares owned within an account. The orange caution icon will show if paperless delivery was selected by the account owner with the voting rights for these shares. You can still change these preferences, but you are warned you are changing the decision set by the account owner with voting rights.

Accounts	Statements	Trade Confirms	Tax Docs/1099s	Performance Reports	Notices & Disclosures	Shareholder Communications
Astor Frank Family Trust (*1111)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(*4444)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Taylor Derek A (*2222)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(*5555)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Coll-Thomas Jill (*3333)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Adding or updating email preferences

You must input a primary email address when first enrolling online. You can update this email from “Email Preferences” or directly from the “Document Delivery Preferences” screen (as shown below). You will be unable to save or update delivery preferences without a valid primary email address on file.

You will receive an email alert to your registered primary email address when you have a new document ready to view online.

1. On the “Document Delivery Preferences” page, select **Edit** under “Notification Email Address” to change primary email on file.

**Note:** This will also change the primary email across your entire Wells Fargo/Wells Fargo Advisors relationship.

WELLS FARGO ADVISORS

Account Summary | Brokerage Overview | Portfolio | Research | Customer Service

Document Delivery Preferences

You've chosen paperless delivery for all except tax documents.

You can change your delivery settings at any time.

Delivery Settings: Paperless - Except Tax Docs Save

View my current Delivery Settings details >

Notification Email Address sam.lee@gmail.com Edit

Shareholder Communications PIN 1234 Edit

Notification Email Address ? @gmail.com Edit

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2. Enter your preferred email and select **Save**.

- You will receive an email titled, “Confirm your email address for Wells Fargo.”
- Select the link to confirm your address.
- Return to Access Online and click **Continue**.
- You will then be taken to the “Brokerage Overview” page. If you want to change delivery preferences now that your email is updated, return to the “Document Delivery Preferences” page to change and save preferences.

Update Contact Information

Email Addresses

Primary	Secondary	Other
sam.lee@gmail.com		

Cancel Save

## Navigating Combined Statements

This section will only show for those with accounts in a statement linked service to reduce statement mailings and notifications.

The “Combined Statements” section shows you all your statement linked services, which can each be expanded to show the account detail. Blue informational icons will show when you aren’t the owner of the primary account in a statement linked service to indicate that you can’t update preferences.

In the example below:

A. “Statement linked service 1, 3, and 4”—all account owners will receive paperless statement notifications because the boxes are checked.

B. “Statement linked service 2”—If an account is part of a statement linked service but the account owner is not online, the account will be footnoted with a small dagger icon. Here, Grandma is not online so she will receive her statement through the mail. The owner of the primary account of statement linked service 2 will only receive an Account Summary page for Grandma’s account.

Delivery Settings: Customize Save

Combined Statements A checkmark indicates paperless delivery.

Linked Services	Statements
Statement Linked Service 1	<input checked="" type="checkbox"/>
Statement Linked Service 2	<input type="checkbox"/>

Accounts

*4040 (*5050) (Primary)	*7777 (*2020)	Grandma's Acct 1 (*4040)
Coll-Thomas Jill (*8080)	*6666 (*1010)	Grandma's Acct 2 (*6060)
Quinn Joseph Trust (*1111)	*2222 (*3333)	

†The owner of this account is not online. They will receive their account statement through the U.S. mail.

Grandma's Acct 1 (\*8019)<sup>†</sup>

Grandma's Acct 2 (\*6587)<sup>†</sup>

†The owner of this account is not online. They will receive their account statement through the U.S. mail.