

How to Request Paperless Documents from ETrade

1 Log in to ETrade/Liberty

2 Select the account you would like to make paperless under the "Assets" list.

A&I FINANCIAL SERVICES LLC
Optimizing Assets and Income

All Accounts Overview
Current Net Worth

Spending & Budget
Keep your long-term vision on track

Goals
See and manage your cash flow

Transactions
View transactions, actions and transfers

Holdings
View holdings in more detail

Connections
Manage Your Connected Accounts

Notifications & Announcements
223 days ago: See all of your financial accounts at any financial institution. Click to read more and/or watch how-to videos about Complete View.

NET WORTH OVER TIME
1 Month 3 Months 6 Months Year to Date

June 3 2019

Click Here

3. Jun 10. Jun 17. Jun 24. Jun 1. Jul 8. Jul 15. Jul 22. Jul 29. Jul 5. Aug

Account	Name	Type	Institution	Sync Status
			E*TRADE Advisor Services	Good

3 You will be led to the next screen. Select the "About your account" tab.

A&I FINANCIAL SERVICES LLC
Optimizing Assets and Income

Click Here

Overview[†]
Net Assets

Holdings
Securities 98% Cash 2%

Performance
View performance and income

Transactions
View transactions, actions and transfers

About your account
Account Information, Documents & Settings

Notifications & Announcements
223 days ago: See all of your financial accounts at any financial institution. Click to read more and/or watch how-to videos about Complete View.

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Click on the "Document Delivery Options" tab.



The screenshot shows the A&I Financial Services LLC account dashboard. The 'Document Delivery Options' tab is highlighted with a yellow arrow and a 'Click Here' callout box. The dashboard includes a navigation bar with 'Home', 'Forms', 'User Guides', 'Agreement', and 'Diagnostics'. Below the navigation bar, there are sections for 'Overview', 'Holdings', 'Performance', 'Transactions', and 'About your account'. The 'Document Delivery Options' section is expanded, showing a table of statements and a list of delivery methods.

Period Ending	Description	Statement
06/30/2019	Quarterly statement for period ended 06/30/2019	View
03/31/2019	Quarterly statement for period ended 03/31/2019	View
12/31/2018	Quarterly statement for period ended 12/31/2018	View
09/30/2018	Quarterly statement for period ended 09/30/2018	View
06/30/2018	Quarterly statement for period ended 06/30/2018	View
03/31/2018	Quarterly statement for period ended 03/31/2018	View

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Enter email address, Select "Email" for both Statements and Proxies and Interim Mailings, Create and Enter a 4 digit PIN, Agree to terms and click "Save"



The screenshot shows the 'Document Delivery Options' form. The 'Email' field is highlighted with a yellow box. The 'Proxies and Interim Mailings' and 'Statements' sections have 'Email' selected. A 'Click Here' callout box points to the 'Save' button. The form includes a 'Document Delivery Terms of Agreement' section with various terms and conditions.

Document Delivery Terms of Agreement

Availability of Electronic Statements and Documents - Account holders may elect to receive electronic versions of the account statements, statement inserts, and account related documents as they are available for delivery rather than receiving the printed versions that are currently sent in the mail. E*TRADE Advisor Services will send a notice to the email address on record for the account when new statements and documents are available for access via a web link. In order to elect to receive electronic documents provide your consent by checking that you have read these terms and click on the save button below.

Availability of Electronic Proxies and Interim Mailings - Account holders may elect to receive electronic versions of the Proxies and Interim Mailings as they are available for delivery rather than receiving the printed versions that are currently sent in the mail. We will send a notice to the email address on record for the account when new Proxies and Interim Mailings are available for access via a web link. In order to elect to receive electronic documents provide your consent by checking that you have read these terms and click on the save button below.

Revoking Consent - Your consent, when given, is effective until further notice by E*TRADE Advisor Services or it is revoked by an account holder. You may revoke your consent and begin to have paper documents mailed to your address of record by selecting standard mail, agreeing to the terms and saving your changes. If you do withdraw your consent, you will begin receiving paper copies of your statements at the cost, if any, as previously disclosed/stated by your advisor.

Information on Systems Requirements - To enroll in the electronic delivery program and receive electronic documents you must have a valid email address on record at E*TRADE Advisor Services and Internet access via a browser that is JavaScript-enabled, Explorer or Firefox, and the ability to read Portable Document Format (PDF) documents.

Invalid Email Address - If your delivery preference is set back to paper delivery because of an invalid email address, you will need to re-enroll for e-delivery.

Electronic Delivery Exceptions - While account statements and the associated statement inserts are available for electronic delivery not all account documents are available in electronic form at this time and you may continue to receive some documents in paper form.

I and all other owners, custodians, and fiduciaries on this account - agree to the terms and conditions of the Document Delivery Terms of Agreement.

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For Future Reference:



PIN: _____

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Please contact Client Care or your Advisor with any questions - (303) 690-5070



Securities provided through Geneos Wealth Management, Inc. member FINRA and SIPC. Investment advisory services offered through A & I Financial Services LLC, Registered Investment Advisor.