

Enroll for Access Online

If you already have an Advantage Program, IRA, or Investment (Brokerage) account and would like online access to your account:

- Call Access Online Support at **1-877-488-3748**, Monday – Friday, 8:00 am to 8:00 pm, ET.
- A representative will help you establish your login credentials (User ID and temporary Password) and provide the login Web address.
- Bookmark the login Web address for future logins.
- The Access Online representative will also assist you with your initial login and make sure you were able to successfully change your Password to something of your choosing.
- Once complete, you can log in to Access Online immediately to view your accounts and documents.
- Upon initial login, you will be presented with an Online Agreement which will need to be signed and accepted before online access is granted. You will only need to complete the Agreement once and it will not be presented upon subsequent visits.

Accounts & Services | Markets | Quotes & Research | Trading | Education | Customer Service

ACCOUNT SUMMARY Quote:

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Securities priced as of Previous Market Close [Nickname your Accounts](#)

Portfolio Account Summary						
Account Name	Account Number	Acct. Type	Securities Market Value	Cash & Cash Alt.	Margin Balance	Account Value
BROK ◀	*1234	Cash	\$45,721.30	\$1,100	\$0.00	\$46,821.30
Household Total					\$0.00	\$46,821.30

The Account Value and Securities Market Value columns are calculated with market prices (delayed at least 15 minutes) as of the stated "As of" date and time, or as of the last price available where applicable. All figures are updated to reflect intraday account activity.

Please Note: During the late evening and early morning hours, weekends, and holidays, account balances may fluctuate significantly and not reflect accurate values due to pricing updates received throughout the night.

◀ Denotes account currently selected.

Account Records

- Account Summary**
- Balances
- Portfolio
- Activity
- Asset Allocation
- Realized Gains/Losses

Statements & Documents

- Statements
- Trade Confirmations
- Tax Documents/1099s
- Delivery Preferences

For assistance with enrollment or for technical support, please contact Access Online Support at **1-877-488-3748**, Monday-Friday, 8:00 am to 8:00 pm, ET.

Go Paperless!

With Access Online, you have immediate online access to your account Statements, Trade Confirmations and Tax Documents/1099s - as soon as they are created.

Go paperless and turn off paper delivery of your account documents and shareholder communications:

- Log in to Access Online and select 'Statements & Documents' under the Delivery Preferences section of the Customer Service tab.
- Choose to turn off paper delivery of *all* documents for *all* of your accounts, or for only certain document types and accounts.
- Create a 4 digit Shareholder Communications PIN so that you can vote your proxy shares online.
- Select an email address from the drop down menu to which an email notification can be sent when a document is available to view online.
- Review the **Disclosure Statement Regarding Electronic Delivery of Documents**. By accepting the disclosure statement, you will turn off paper delivery of your selected documents sent through the mail.
- To view your documents online, select a document type under the Statements & Documents section of the Accounts & Services tab.

NOTE: If any of your shareholder communication materials are not available electronically, you will receive the standard printed materials in the mail with no announcement made by email.

STATEMENTS & DOCUMENTS

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Go Paperless

To turn off paper delivery:

- Click the checkboxes for each account and document type for which you want to turn off paper delivery. To turn off paper delivery for a document type (i.e., Trade Confirms) for all accounts, click the "Select All" link under that document title. To turn off paper delivery for all document types for all of your accounts with one click, click the "Go Paperless" checkbox.
- Online delivery of Shareholder Communications requires the use of a PIN to vote your proxy shares online. Please create a 4-digit number for your PIN. This PIN will only be used to vote your proxy shares and is not tied to any of your financial accounts or check cards.
- Select an email address to which you would like to receive email notifications. You will receive an email notification when the account document becomes available online. If there is more than one owner on an account, you have the choice to receive the email notification or not.
- Click the "Save Changes" button.

To turn paper delivery back on:

- Uncheck the boxes for each account and document type for which you want to turn paper delivery back on.
- Click the "Save Changes" button.

[Go To Account Statements](#)

Go Paperless

Account Name	Account Number	Statements	Trade Confirms	Tax Docs/1099s	Shareholder Communications	Email Alerts
		Select All	Select All	Select All	Select All	
BROKERAGE	*1234	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Create New Shareholder Communications PIN (4 digits): [What's This?](#)

Email Address For Notifications: [Add Email Address](#)

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