

Go Paperless with eDelivery

We are reaching out to remind you about the way to manage the ongoing documents you receive in the mail, and to save you money by quickly and easily enrolling in eDelivery through eQuipt.

How eDelivery helps you:

- Receive an e-mail when new documents become available.
- Retain and access documents online for seven years.
- Manage your preferences: Print, store online, or both.
- Save money on delivery costs. (Back in June 2021 a \$1.50 confirmation fee, per mailing, was assessed to everyone who chose not to go paperless. This fee is not imposed by Black Financial Services. It stems from trends in financial services to increasingly move toward electronic delivery).

How to Enroll:

1. Go to: equipt.osaic.com/
2. Create an account by clicking “**Sign Up**”, towards the middle of the page.
 - a. The next page will be **Welcome to eQuipt!** On this page you will need to enter one of your active account numbers, your Date of Birth, Last 4 digits of SSN and your Zip Code. Then click the **Next** box to continue
 - b. You will now be on the **Your Security is Our Top Priority** screen:
 - i. The first prompt will display the phone number(s) on file for you.
 - ii. Click on the number where you want to receive the security code. (If only one number is on file it will be preselected). Then click on either **Send Passcode via Text** or **Call Me With My Passcode**.
 - iii. You should now be on the **We Just Texted You** page, when you receive the passcode, input it and click **Verify Passcode** to continue.
 - c. The next page **Is This Information Still Accurate?** Review your phone number(s) and email address(es) for accuracy. You can edit or delete any incorrect information or add new information, as needed. Click **Everything Looks Right** when done.
 - d. On the **Register** screen, create a username and password, click the checkbox to agree to the terms described, and click **Next**. Your enrollment is now complete.
 - e. To become paperless and avoid the paper fee, click the **eQuipt** tab at the top of the screen, then click **Settings** on the next line down.
 - f. Select **e-Delivery Preferences** on the left of the screen.
 - g. You may choose **Quick Enroll** or **Edit**. **Quick Enroll** will turn on eDelivery for all communications (including statements and tax documents). **Edit** enables you to make individual selections for each communication type for each account. Most people choose **Edit** so their statements and tax documents still come through the mail (no mailing fee for statements and tax documents).
 - h. When complete, simply click on the **Logout** button.

Please do not hesitate to contact Karen, at our office, if you have any questions.

Sincerely,

Margo

Margo Black Scepaniak
Osaic Financial Advisor

Michelle

Michelle Herickhoff
Osaic Financial Advisor