eDelivery (Click To Agree)

The electronic delivery (eDelivery) service enables account holders the option to receive next-day e-mail notification that an eligible document is available to view online instead of receiving the document through U.S. mail.

eDelivery Enrollment Process

1. Rep or MMLIS initiates eDelivery for an account in Wealthscape

2. The account holder receives an email

3. The account holder click "I Agree" in the email. The system immediately acknowledges that the change to eDelivery for the listed accounts is successful. If not successful, the account holder is information of the reason.

4. If successful, the delivery instructions for the selected accounts and document types change to eDelivery.

Facts

An e-mail address can be entered for each account holder for joint or multiple-owner accounts during new account setup or after. However, only one account holder e-mail address, designated as the e-mail address of record, can be used for notification that documents are available for viewing.

The e-mail address of record must be the e-mail address of an account holder who has authority to make transactions and act on behalf of the account.

Upon receipt of the e-mail, after the account holder clicks the **I Agree** link in the e-mail, the accounts are enrolled in eDelivery for the specified documents. Clicking I Agree in the e-mail indicates agreement to the terms and conditions of the Electronic Notification Agreement.

Enrolling in eDelivery does not require the account holder to log in to Wealthscape Investor..

After the account is enrolled in eDelivery, the account holder receives an e-mail notification when a document is available to view. The printed document is not mailed to the account holder. The account holder must have access to Wealthscape Investor to view the electronically delivered documents.

An account cannot be updated for eDelivery if the account mailing address has been changed within the last five days.

You can make modifications only when restrictions place on the account do not block eDelivery

Submission Methods:

1. Contact MMLIS Rep Services via phone or email listing client accounts to have request sent to (800-542-6767, Option 1, Option 1)

2. Rep can have emails sent to client via utilizing "Document Delivery Instructions" under the Service tab in Wealthscape.