

eDelivery Instruction Guide

**CREATING YOUR USER ID & SIGNING UP FOR ELECTRONIC DELIVERY
OF STATEMENTS, CONFIRMS, AND REPORTS**

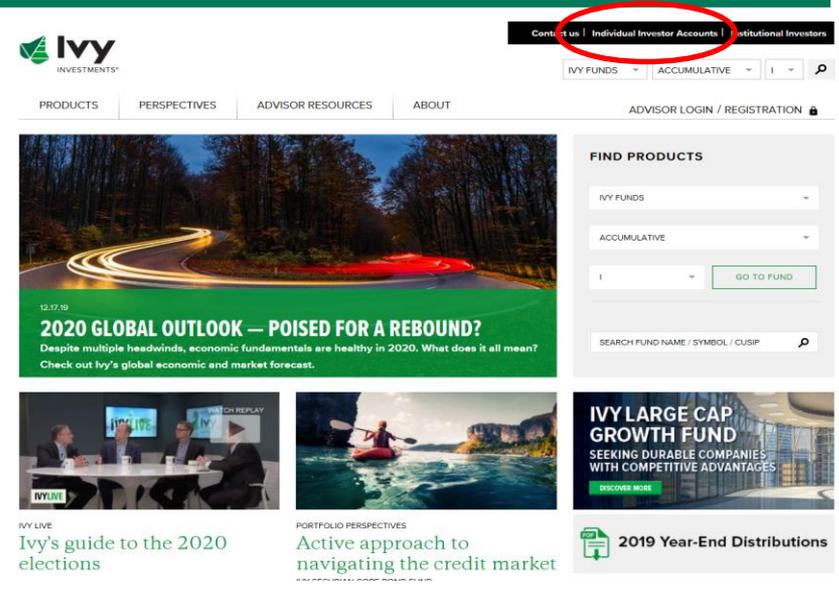


Online User ID Creation

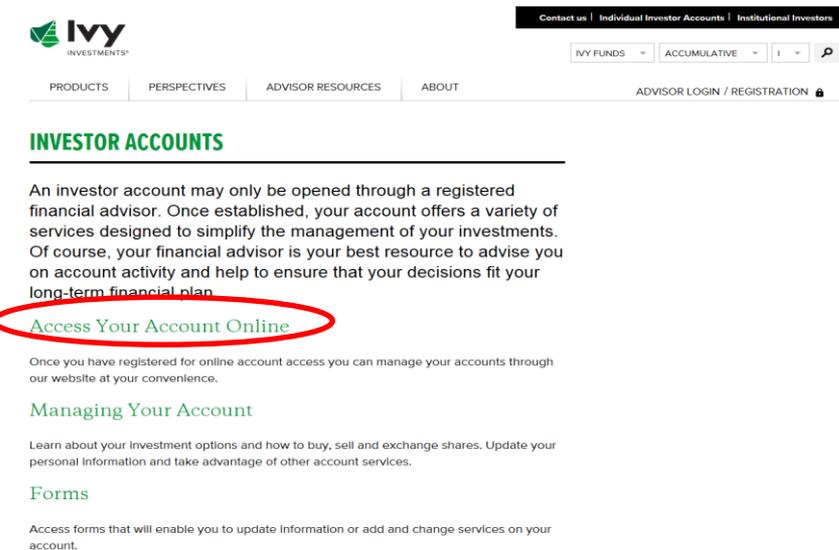


Create a User ID

- Step 1:
- Go to Ivyinvestments.com
- Click on “Individual Investor Accounts”



- Step 2:
- Click on “Access Your Account Online”



Create a User ID

- Step 3: Create User ID Link
- Click on "Create User ID" at the top of the page or "Create a User ID" under the log-in fields on the right side of the page.

Ivy INVESTMENTS INDIVIDUAL INVESTORS

Return to [IvyInvestments.com](https://www.IvyInvestments.com)
Customer service 1-800-777-6472
(7:30 AM - 7:00 PM M-F CST)

[Log In](#) [Create a User ID](#) [Create Password](#) [Retrieve User ID](#) [Reset Password](#)

Note: We've updated your account login site to Ivy Investments, reflecting your mutual fund holdings. Your login credentials to access the website and your account details have not changed. This new look simply better reflects the mutual fund branding. The Ivy Funds are distributed by Ivy Distributors, Inc. and are managed by Ivy Investment Management Company, both of which are subsidiaries of Waddell & Reed Financial, Inc.

Sign up for eDelivery Today!

Did you know you can sign up to receive your quarterly statement notifications electronically and still receive your year-end statement in paper? You can also sign up to receive prospectus and other compliance documents via email and still receive statements in paper. Check out the many combinations for eDelivery options online! With eDelivery you receive an email as soon as your statements are available and it's easy to view, print, and save your documents by just logging in to your account.

To sign up for eDelivery or manage your current eDelivery Options, simply login to your account, click the "Profile Maintenance" tab then follow the directions for eDelivery Services.

LOGIN [Lost your password?](#)

[First time logging in? Create a User ID](#)

Login to your account

User ID:

Password:

SECURITY STATEMENT:
To protect your valuable information, we use the SSL(Secure Sockets Layer) encryption, the Internet standard for secure transactions. In addition, any sensitive personal information that you send to our website is held in a secured environment, protected by tools such as firewalls and/or database field encryption. No representation is made, however, regarding the unconditional security of such submissions.

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Create a User ID

• Step 4: Create User ID & Password

- User ID - this is the User ID you wish to use to log into your Ivy Funds online account.
- It should be between 6 and 15 characters in length and can be alpha, numeric, or contain special characters.
 - SSN - enter social security number for the account. For UGMA/UTMA accounts, please use minor's SSN.
 - Account Number - please enter mutual fund account number. If you have multiple accounts, you may enter any of the account numbers. Our online views can show information for several accounts. The accounts that show up on your quarterly statement will be shown in your online views.
 - New Password - please enter the desired password for your online account. It must be between 8 - 20 characters and have one special character. Special characters are characters that are not letters and numbers and include the following: () ! @ # \$ % ^ & * - _ + ? , . / ; : [] { } | \ = < > ` ~ - " ' .
 - You will need to verify the password by re-entering it in the "Verify New Password" field.
 - Reset Password Question - this allows you to choose a preset question and provide an answer so that you can reset your password without contacting Client Services for Technical Support.



INDIVIDUAL INVESTORS

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Customer service 1-800-777-6472
(7:30 AM - 7:00 PM M-F CST)

[Log In](#) [Create a User ID](#) [Create Password](#) [Retrieve User ID](#) [Reset Password](#)

Create a User ID

Use this option to establish a User ID when one does not already exist.

User ID: Your User ID is not case sensitive. It should be 6 to 15 characters in length and can be alpha, numeric or contain special characters.

SSN/TIN:

Account Number:

Password: Your Password is not case sensitive. It should be 8 to 20 characters in length and must contain at least 1 special character.

Confirm Password: () ! @ # \$ % ^ * - _ + ? , . / ; : [] { } | \ = < > ` ~ - " ' .

Reset Password Question: -- Select a question --

Reset Password Answer: If you want to be able to reset a disabled or forgotten Password in the future, select a "Reset Password" question and enter the answer. For security reasons, previously entered Reset Password questions and answers are discarded when Passwords are changed.

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TIP

- Before hitting submit, review all your fields to make sure the information entered is correct and that your password meets the required parameters.
- Choosing a password that meets the requirements is one of the top reasons why error messages are received.

Create a User ID

- Step 5:
- The next page will give you confirmation that the User ID creation was successful. Press "Return" to go to the Disclaimer page.
- If you do not receive confirmation, you will receive an error message.
 - An explanation of error messages can be found on the next page.
 - You will have to go back to correct the problem.
 - If you are unable to setup your User ID successfully, contact Client Services at 1.888.923.3355 for assistance.

The screenshot shows the Ivy Investments Individual Investors portal. At the top left is the Ivy Investments logo. To its right, it says 'INDIVIDUAL INVESTORS'. In the top right corner, there is a link 'Return to IvyInvestments.com' and customer service information: 'Customer service 1-800-777-6472 (7:30 AM - 7:00 PM M-F CST)'. Below the header is a navigation bar with buttons for 'Log In', 'Create a User ID', 'Create Password', 'Retrieve User ID', and 'Reset Password'. The main content area is titled 'Create a User ID Confirmation'. Below this title, it states 'User ID WTEST2020 has been established.' and there is a green 'RETURN' button. At the bottom, there is a copyright notice: '© Waddell & Reed, Inc. 2000-2020 Ivy Distributors, Inc. All rights reserved.'

- Step 6:
- The next page will display our disclaimer. Read the disclaimer, check the box at the bottom of the page when you have read, understand, and accept the terms and conditions as provided in the disclaimer and hit submit to enter your account.
- If you do not check the box, you will receive an error message when you hit submit. You must accept the disclaimer to be able to use your online account.

Create a User ID

- The last four digits of the number provided in brackets is the error code.
- Common Errors:
 - **1306** - The User ID must be entered and must be between 6 to 15 characters in length.
 - **1327** - The Tax Identification Number must be entered and must be 9 characters in length.
 - **1343** - Account number must be entered for this transaction, and must be 10 characters or less.
 - **1321** - If you are receiving this error, you either did not provide a password or your password did not meet the specified parameters. The password must be between 8 and 20 characters in length and include at least 1 special character. Special characters include: () ! @ # \$ % ^ & * - _ + ? , . / ; : [] } { | \ = < > ` ~ - " ' }
 - **1368** - If you are receiving this error, your password was only entered 1 time. The password must be provided in both the New Password and Verify Password fields to be accepted.
 - **1313** - The Reset Password Question and Reset Password Answer must both be entered or left blank. If you are receiving this error, you did not select a Reset Password Question and/or did not provide a Reset Password Answer.

Log In	Create a User ID	Create Password	Retrieve User ID	Reset Password		
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Create a User ID

Use this option to establish a User ID when one does not already exist.

User ID:

Your User ID is not case sensitive. It should be 6 to 15 characters in length and can be alpha, numeric or contain special characters.

The User ID must be entered for this transaction and must be 6 to 15 characters in length. Please enter the User ID. [FWEB1306]

SSN/TIN:

The TIN entered must be exactly 9 digits. [FWEB1327]

Account Number:

Account number must be entered for this transaction, and must be 10 characters or less. Please enter the Account number. [FWEB1343]

Password:

Your Password is not case sensitive. It should be 8 to 20 characters in length and must contain at least 1 special character.

New Password must be entered for this transaction, and must be between 8 and 20 characters in length, with at least 1 special character, please re-enter the password. [FWEB1321]

Confirm Password:

[FWEB1321] {}!@#%&*+?.,/;:[]\|<>`~-'

New Password and Verify Password must be entered for this transaction, and must be between 8 and 20 characters in length, with at least 1 special character, please reenter the New Password and Verify Password. [FWEB1368]

Reset Password Question:

-- Select a question --

If you want to be able to reset a disabled or forgotten Password in the future, select a "Reset Password" question and enter the answer. For security reasons, previously entered

Reset Password Answer:

If you are unable to determine the error or able to fix the issue, contact Client Services at 1.888.923.3355 for assistance. Please have the error page or error code available.

eDelivery Sign-Up



eDelivery Service

- To Accept eDelivery & View Statements, sign into your account and use the Profile Maintenance tab on the top navigation menu
- Then Select “Sign-Up or Change eDelivery Services” and follow the directions.
- Step 1: Add your Email Address
- Step 2: Re-enter your Email Address
- Step 3: Choose the documents you would like to receive via eDelivery
- Step 4: Hit Continue

Note:

- **Quarterly Statements** are viewable online to all shareholders. However, eDelivery consent is required in order to receive electronic notifications via e-mail each quarter when they become available. Quarterly Statements will no longer be sent by mail.
- **Trade Confirmations** are available for viewing online only, once eDelivery consent has been provided.
- **Compliance Reports** (Prospectus, Semi-Annual and Annual Reports) can be delivered electronically, via e-mail notification, which includes a hyperlink to view them on our website. Compliance Reports will no longer be sent by mail.
- **Year End Statement** will be viewable online to all shareholders. However, if elected, the statement can also be sent via US Mail.
- **For all options, you will be asked to provide your e-mail address (only one e-mail address per customer can be maintained). Select the document type(s) using the ‘Yes’ radio button and click CONTINUE.**

Return to [IvyInvestments.com](#) | Logout
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Portfolio Summary | Transaction History | Historical Account Balance | Statements | **Profile Maintenance**

eDelivery Services

Profile Maintenance -> eDelivery Services
Customer Name: WADDELL TEST

eDelivery provides a fast, easy and convenient way for you to receive your current and historical quarterly statements, daily trade confirmations and annual/semi-annual reports electronically.

To enroll, simply provide your email address and select which documents you wish to receive online. For portfolios with multiple taxpayer identification numbers or SSN's, each individual will need to sign-up for eDelivery in order to ensure electronic delivery of the documents you've selected. Once your request is processed, we will replace mailing of paper copies of these documents with email notifications that the documents are available online. You will continue to receive these emails until you cancel/modify this service or we are unable to reach you via email.

1. Enter the e-mail address where notifications should be delivered.
Enter your e-mail address

2. Re-enter your e-mail address for verification.
Re-enter your e-mail address

3. Below are the documents you can receive online through eDelivery. For portfolios with multiple taxpayer identification numbers or SSN's, the document selection must be the same across all accounts within your portfolio in order to be processed. Or, to cancel eDelivery, click "No" for all BUT "Year End Statement via US MAIL" and you will receive the referenced documents by mail.

Document Types	E-Delivery	U.S. Mail
QUARTERLY STATEMENTS	<input type="radio"/>	<input checked="" type="radio"/>
TRADE CONFIRMATION	<input type="radio"/>	<input checked="" type="radio"/>
COMPLIANCE REPORTS	<input type="radio"/>	<input checked="" type="radio"/>

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