

Invite your brokerage clients to enroll in eDelivery

Send an advanced notice email, followed by the 'Click to Agree' invitation

Steps for Click to Agree

The best way to promote eDelivery is through **Click to Agree**, which lets your MMLIS brokerage clients enroll with a single click. Just follow these simple steps:

1. **Optional notification emails:** Decide if you want to send an advanced notification email to your clients before sending them the Click to Agree email. See suggested copy below.
2. **Choose the clients** you would like to invite to enroll in eDelivery. Use the Document Delivery Instructions link from the Service Menu in Wealthscape to search for and choose accounts, add/edit email addresses, and initiate a request to send Click to Agree emails. Review [this video](#) for details.
3. **Send the Click to Agree email.** Your clients receive the automated email that night from MML Investors Services (e-notification@mail.mybrokerageinfo.com) inviting them to enroll in eDelivery. Your client simply clicks the 'I Agree' button within the email to enroll in eDelivery.
4. **It's all set.** eDelivery begins within 24 hours after your client enrolls.

Suggested copy for client email

Sample language follows that MMLIS advisors can use to provide advanced notice to clients and let them know what action to take:

During the week of **XXX**, you will receive an email from MML Investors Services (e-notification@mail.mybrokerageinfo.com) inviting you to enroll in eDelivery for your MMLIS brokerage account.

eDelivery will help you make the most of your online brokerage experience and give you instant access to your documents. You can view several document types such as statements, trade confirmations, letters, shareholder reports, tax forms and quarterly performance reports. With eDelivery, you receive an email notification as soon as your brokerage account documents are available.

It's easy to enroll. When you receive the email, simply click on the "I Agree" button and within 24 hours, eDelivery will begin for your MMLIS brokerage account.