

eDelivery with Click To Agree

Reduce costs while improving client satisfaction.

With eDelivery, investors will receive an email notification when applicable documents are ready for viewing. They can view shareholder reports, prospectuses, statements, regulatory inserts, and other reports — all with zero clutter and paper waste.

eDelivery should help decrease your firm's expenses, increase productivity and help improve customer satisfaction.

- Reduce postage costs
- Limit the amount of paper sent
- Improve your sales assistants' productivity with online access to documents
- 24/7 online access
- Next-day notifications of available statements, documents, and trade confirmations
- Easy enrollment process

It's as easy as 1-2-3.

We believe the best way to promote eDelivery adoption is through Click To Agree. Click To Agree lets investors enroll in eDelivery with a single click.

1 Choose your clients

Log in to WealthescapeSM and click the Document Delivery Instructions link from the Service menu. Here you have the ability to search for accounts, add/edit email addresses, and send Click To Agree emails.

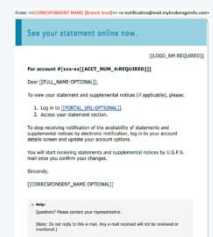
2 Clients Click To Agree

Your clients will receive an email from your firm with your firm's branding, inviting them to enroll in eDelivery. Multiple accounts for the same investor can be combined in one email. Your clients simply click the I Agree link within the email to enroll in eDelivery.



3 All set

Within 24 hours after investor enrollment, the program will suppress paper statements of eligible documents and begin generating email notifications when documents are available for viewing. If there is no monthly activity, an eDelivery email for the statement will be generated quarterly.



Enroll Using Wealhscape

Select Service > Service & Workflow > Document Delivery Instructions.

NOTE: When a restricted account is blocked for eDelivery, the account row on the window is grayed out. In addition, if an account is not enabled for certain document types, those document types are grayed out for that account.

Document Delivery Instructions
 Selecting eDelivery will generate an email to the account holder. The account holder must then select I Agree to enroll in eDelivery.

Search By Client Name **A**

Manage Delivery Instructions As of 02-Jun-2015 11:40 AM ET

Set all Documents to eDelivery **B**

Manage Delivery Instructions for all selected accounts **E**

Account	Account Holder C	Email	Confirms/Conf...	Statements &...	Eligible Custo...	Tax Forms & R...	Shareholder R...	Quarterly Perf...
033-111111 (I)	ACCT HOLDER 1 (INDV)* C	Add Email D	F eDelivery	eDelivery	eDelivery	U.S. Mail	U.S. Mail	U.S. Mail
033-222222 (I)	ACCT HOLDER 2 (INDV)	ACCTHOLDER@TEST.COM	U.S. Mail	U.S. Mail	U.S. Mail	U.S. Mail	U.S. Mail	U.S. Mail

*Indicates Primary Account Holder

G

- A Search By:** Select **Account #** or **Client Name** and enter a full or partial account number or client name. Select **Go**.
 - If you enter the full account number or client name, the account or client displays.
 - If you enter a partial account number or client name, the Account or Client Lookup window opens. On the window, you can select multiple accounts to update.
- B Set all Documents to eDelivery:** Choose to set all eligible documents for all eligible accounts to eDelivery.
- C Account Holder:** Select the account holder to receive the Click to Agree Email and the notification emails.

- D Email:** If an address is present in the Email column, then you can send a Click to Agree email. If the Email column says "Add Email" then you will not be able to send the Click to Agree email to an investor.
- E Delivery Instructions (all accounts):** Select **eDelivery** to change instructions by document for all eligible accounts.
- F Delivery Instructions (one account):** Select **eDelivery** to change instructions by document for one account. Select **U.S. Mail** to stop eDelivery of documents.
- G Save Changes:** Select to generate the Click to Agree Email to the email address of record.

Delivery instructions display Pending eDelivery and the Click to Agree Email is generated. After the account holder selects I Agree, delivery instructions change to eDelivery.

For more information, contact your Home Office or Fidelity Representative.



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