

Why eDelivery?

WHAT IS EDELIVERY?

eDelivery provides online access to your important account communications. Rather than receiving these documents through traditional mail, you will receive an email notification when new documents are available to view online. The following account communications are eligible for eDelivery:

- Statements and reports
- Trade confirmations
- Tax documents
- Notifications and letters
- Quarterly performance reports²
- Proxy material, reorganization material, and shareholder communications
- Trade-confirming prospectuses for mutual funds, exchange-traded funds and unit investment trusts³

¹ Statements are available for 10 years, trade confirmations for six years and tax documents for seven years

² Not applicable to all clients

³ Contact your financial professional for more information.

A more convenient, secure and flexible way of receiving important communications.

As a client with accounts held at BNY Mellon | Pershing, you can choose to enroll in eDelivery and access investment account information electronically. It is a simple, swift and secure way to receive financial account communications and view statements, trade confirmations and tax documents through an online, password-protected portal—with historical data available from the day of initial signup¹.

WHAT CAN EDELIVERY OFFER?



Convenience View, download, print and email account communications from any computer with internet access and applicable PDF software.



Increased Security Access account communications in a password-protected environment, eliminating paper delivery of sensitive financial information and reducing the risk of identity theft.



Centralized Record Keeping Eliminate the clutter of extra paper at home, quickly search online for the account communications you need and reduce your carbon footprint.



Paper Free Prospectuses Download and review prospectuses and other important fund information.

GETTING STARTED IS AS EASY AS 1-2-3!

Enroll by following these simple steps:

1. Log in to your online portal
2. Select “Go Paperless” at the top of any page
3. Follow the on-screen prompts to select the documents to be delivered electronically

Enrollment can be activated as quickly as the same day as registration (if occurring prior to 6 p.m. ET).