

## Opted Delivery Method for Statement Families

Effective September 15, the delivery method opted by the primary account owner of the statement family will reflect as such for the accounts owners within the statement family for the purposes of statement and proxy delivery.

Delivery options for Investor accounts who are a member of a Family will now display the active delivery option as set by the primary member of the family. This display has been updated to mitigate confusion about how statements and proxies are delivered. As a reminder, only the primary member of a family may change the delivery options for statements and proxies. For example, if the primary account owner has elected eDelivery, all accounts within the family will reflect eDelivery.

The delivery method process does not change, as this is a view change only for members of a statement family. Family members' statement/proxy options will now reflect the option selected by the head of household/primary account owner of the statement family.

Let your relationship manager know if you have questions.