



SETTING UP ELECTRONIC STATEMENT DELIVERY

Reduce paperwork and simplify your account management by switching to electronic statement delivery.

The following instructions are intended to help you through the process of requesting electronic statements versus paper. You may have accounts with one or more of the following providers. Identify your account provider(s) and follow the instructions below for each provider account. In most cases, you will be required to register as a user of the website and then make your “paperless” electronic statement request. You will also need personal information to setup your online account. This may include your social security number, your account number, your address, and/or your birth date. Have your information ready when you setup your registration on these websites.

TRANSAMERICA

Step 1 Go to Transamerica’s website: www.transamericaannuities.com/login/registerpolicyholder.aspx

Step 2 Follow the onscreen directions to register as an individual for your online account and establish your User ID and your Password. Once you are able to logon to the website with your new credentials, you will have the opportunity to “go paperless” by signing up for electronic statement delivery.

Need Help? Please contact Transamerica’s Internet Support Group at 1-877-717-8858 or email customercare@transamerica.com. Please note, sending personally identifiable information is not recommended as email is not encrypted.

CNL

Step 1 Go to CNL’s website: www.cnl.com/gopaperless

Step 2 Follow the onscreen directions to register for your online account and establish your User ID and your Password. Once you are able to logon to the website with your new credentials, you will have the opportunity to “go paperless” by signing up for electronic statement delivery.

Need Help? Please contact CNL’s Client Services at 1-866-650-0650 for assistance.

JACKSON NATIONAL

Step 1 Go to Jackson National’s website: www.jackson.com.

Step 2 At the website’s home page click on the green Go Paperless “**Get Started**” button. Follow the onscreen directions to register for your online account and establish your User ID and your Password. Once you are able to logon to the website with your new credentials, you will have the opportunity to “go paperless” by signing up for electronic statement delivery.

Need Help? Please contact Jackson National’s Service Center at 877-565-2968 if you have questions regarding access.

BRINKER CAPITAL

Step 1 Go to Brinker Capital’s website: www.brinkercapital.com.

Step 2 Click on the blue hyperlink in the upper right hand corner “**Need Access or Help Logging In? Click here.**” Then select the 4th option labeled “Request Access.” Follow the onscreen directions to register for your online account and establish your User ID and your Password.*

Step 3 Once you are able to logon to the website with your new credentials, you will have the opportunity to “go paperless” by signing up for electronic statement delivery. Access “Accounts” from the top navigation bar and select “e-Delivery Options” under the “Statements and Records” drop down menu. Follow the onscreen directions.

*You will receive an email from the webmaster@brinkercapital.com stating access is being created and you will receive confirmation in 24-48 hours.

Need Help? Please contact Brinker Capital at Client Service at 1-800-333-4573 or clientservice@brinkercapital.com. Website related questions can be directed to webmaster@brinkercapital.com.

MORNINGSTAR

Step 1 Go to Morningstar’s website: <http://myportfolio.mp.morningstar.com>.

Step 2 Click on the “**Account Holders, click here**” link in the New Users section of the home page. Follow the onscreen directions to register for your online account and establish your User ID and your Password.

Step 3 Once you are able to logon to the website with your new credentials, you will have the opportunity to “go paperless” by clicking on the “Profile” icon at the top of the page and expanding the “Manage Communication” section. Select the “E-delivery” check box next to each account and click submit.

Need Help? Please contact Morningstar’s Support Services at 1-877-626-3227.

NATIONAL INTEGRITY

National Integrity does not offer e-delivery.

Step 1 To view your account information online, go to National Integrity’s website at www.wsfincialpartners.com. Click on the red “Account Access” bar from the top navigation menu. Select “Contract Holders/Clients” from the drop down menu.

Step 2 Select “New User? Setup your online account!” option. Follow the onscreen directions to register for your online account and establish your User ID and your Password.

Need Help? Please contact National Integrity’s Client Services at 1-800-325-8583 or service@integritycompanies.com.

ADVISORS CAPITAL

Step 1 Your Beltz Ianni & Associates representative must initiate your desired change to e-Delivery.

Step 2 You will receive an email (from Fidelity) requesting your consent to electronic delivery. You consent by clicking the “**I agree**” button. You will then be directed to a confirmation page on fidelity.com where you complete the consent process. You will receive a paper confirmation of this change.

Need Help? Please contact Beltz Ianni & Associates at 585-340-5200.

PERSHING

Step 1 You will be required to complete Pershing’s “User ID and Electronic Delivery Request” form. The completed and signed form is provided to your Beltz Ianni & Associates representative for processing.

Step 2 You will receive an email from Beltz Ianni & Associates with your new User ID and Password credentials along with the website address through which you will access your accounts.

Need Help? Please contact Beltz Ianni & Associates at 585-340-5200.