



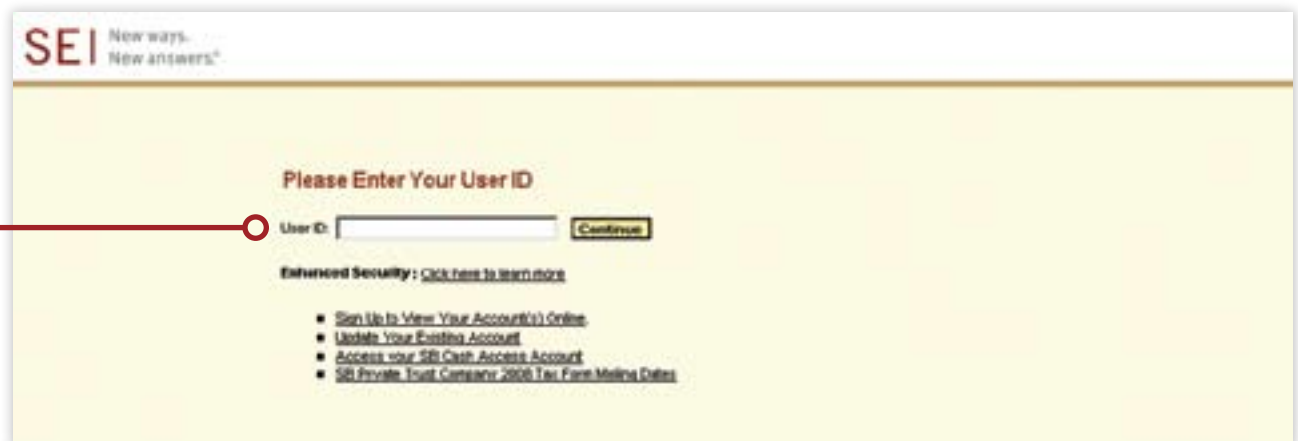
# How-To Guide:

## Signing Up for eStatements as an Existing User of PortfolioAccess.com

As an existing user of PortfolioAccess.com, you can use this guide to set your statement mailing preference to electronic delivery. In addition to being more environmentally friendly, eStatements provide you with the additional benefit of receiving your account information up to one week faster than paper statements in the mail. For a video demonstration of this sign up process, please visit [www.seic.com/eStatements](http://www.seic.com/eStatements).

### Step 1

Log in to the PortfolioAccess website using your User ID.



### Step 2

Navigate to the “Site Options” tab along the top of the screen and select “eStatement Options” from the drop down menu.



## Step 3

Set your statement delivery preference – either online or paper only. In order to receive paperless statements, you will need to select **online-only** and enter your email address before hitting “**Submit**”.

SEI New ways. New answers.

### Step 3: Select Your Statement Preference

Please select your statement delivery preference below. If you select "online-only", please provide your email address. An e-mail will be sent to this email address notifying you each time a new statement is available via the client access website. If you wish to receive paper statements, please select "paper". Your current statement delivery preference is displayed below. If you wish to update your email address, change it in the appropriate boxes and select "submit". No changes will be made to your account until you select the "submit" button.

**Note:** All statements associated with the recipient address will reflect the designated preference. Third-party recipients, if applicable, are also listed below.

Recipient Address	Statement Delivery Preference	Email*	Confirm Email*
JOE DOE 1 FREEDOM VALLEY DRIVE DAKS, PA 19452	<input checked="" type="radio"/> Online-Only <input type="radio"/> Paper	jdoe@youemail.com	jdoe@youemail.com

\*Required for Online-Only Statements

## Step 4

Review and **agree** to the legal terms and conditions for receiving electronic statements by selecting “**OK**”.

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Change Password | Logout

Accounts > | Reports | Account Tools | Site Options

### Select Your Statement Preference

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Please select your statement delivery preference below. If you select "online-only", please provide your email address. An e-mail will be sent to this email address notifying you each time a new statement is available via the client access website. If you wish to receive paper statements, please select "paper". Your current statement delivery preference is displayed below. If you wish to update your email address, change it in the appropriate boxes and select "submit". No changes will be made to your account until you select the "submit" button.

**Note:** All statements associated with the recipient address will reflect the designated preference. Third-party recipients, if applicable, are also listed below.

**Legal Terms and Conditions for Paperless Statement**

By selecting the checkbox below, you give your affirmative consent ("consent") to SEI Private Trust Company ("SEIPTC") to eliminate the delivery of paper account statements, as well as periodic notices, for the accounts selected and agree to the following terms and conditions:

- Statements will be provided to you in an electronic form via your client access website. You will no longer receive a paper copy of your statements unless you withdraw your consent.
- You may continue to receive paper statements for one statement cycle after requesting electronic statements.
- You have the right to receive paper statements and you may withdraw your consent at any time.

I agree to the terms and conditions outlined above and confirm that my computer meets [minimum system requirements](#).

## Preference Saved

Your eStatement mailing preference has now been successfully saved and processed. Beginning with the next statement cycle, you will receive electronic statements.

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### eStatement Confirmation

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Your preference was successfully saved.