



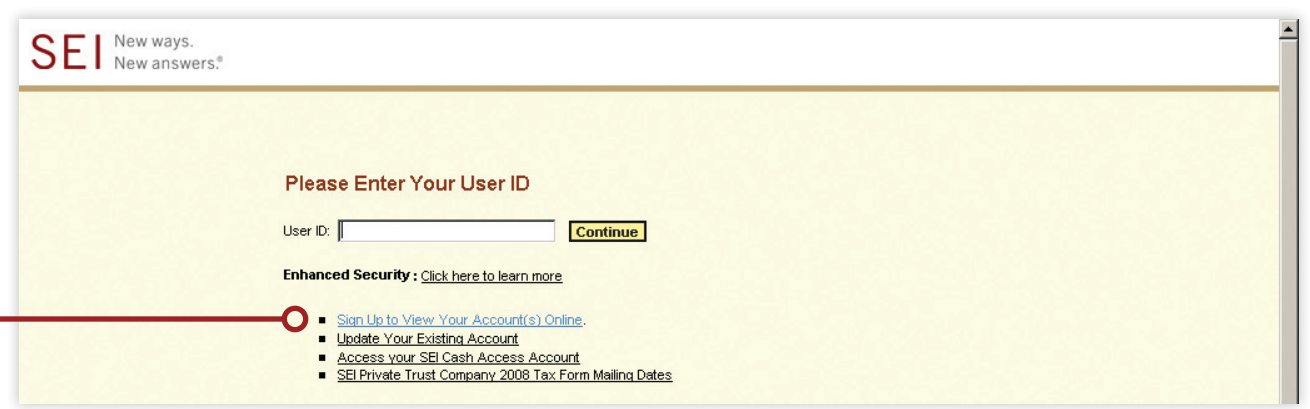
How-To Guide:

Signing Up for eStatements as a New User of PortfolioAccess.com

This guide provides you with an overview of the easy steps to sign up for PortfolioAccess.com and how 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 by paper statements in the mail. For a video demonstration of this sign up process, please visit www.seic.com/eStatements.

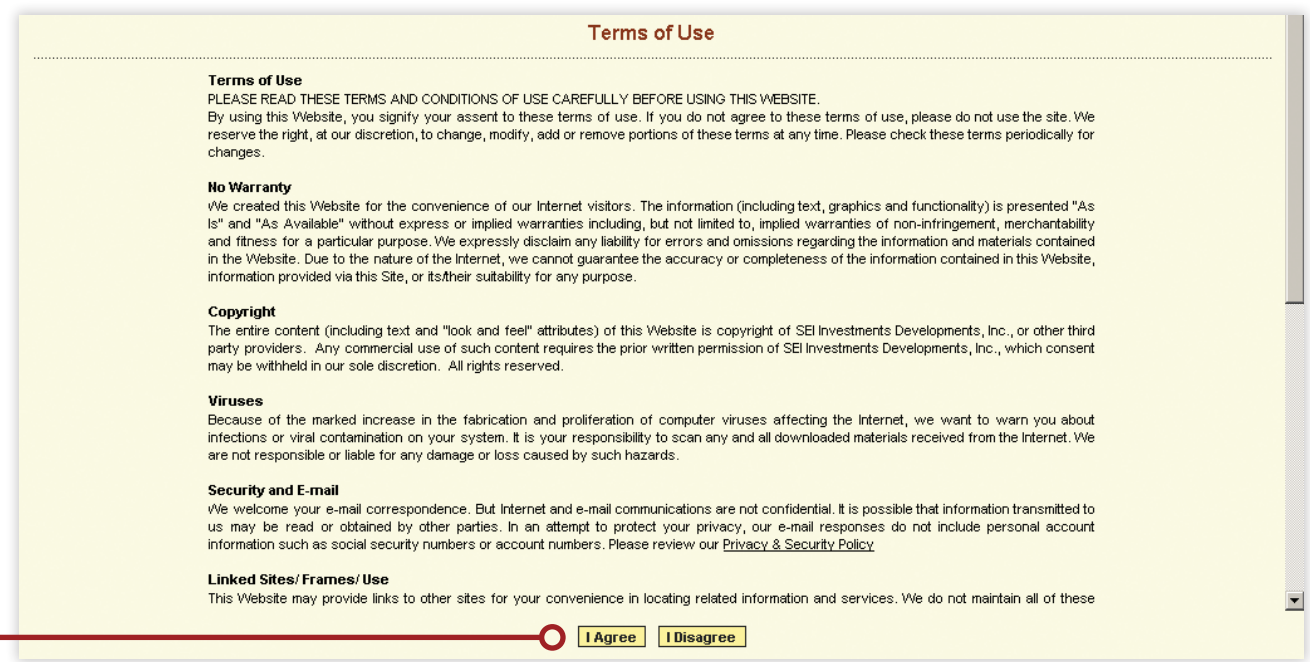
Step 1

In order to receive your statements electronically, you must first register to use SEI's safe and secure client access website. To sign up, simply visit www.portfolioaccess.com and select "Sign Up to View Your Account Online".



Step 2

Next, agree to the "Terms of Use" of using the Portfolio Access website by selecting "I Agree" at the bottom of the page.



Step 3

Enter your Personal Information including your **name**, **mailing address**, and **security information**.

SEI New ways.
New answers.*

Step 1: Personal Information

Information Required for Setup

To successfully register for online account access you will need to provide the below information. The security information section is required to establish your User ID. This information will be used to verify your identity should you forget your password or have any inquires about your Online Account Access. If you are having trouble locating this information or have further questions, please contact your financial advisor.

Personal Information

First Name
Last Name
Phone Number
Email Address

Mailing Address

Street Address

City
State or Province
Postal Code
Country

Security Information

Tax Payer ID ((11-11-1111) or (11-1111111))
Mothers Maiden Name
Place of Birth
Date of Birth (mm/dd/yyyy)

Next

Step 4

Add the SEI account numbers for those accounts you wish to access online.

Helpful hint:

Have your SEI paper statement available during this step so you can quickly add your account information.

SEI New ways.
New answers.*

Step 2: Add Account(s) to My Online View

Please provide the following information for each account you wish to access online. You will be allowed five attempts to successfully enter all account information requested. In the event that you exceed five attempts, you will need to restart the registration process. If you are having trouble locating this information or have further questions, please contact your financial advisor.

Account Number Social Security Number/
EIN on the Account (111111111)
1. [Add another account](#)

Next

Cancel

Step 5

Now set your statement delivery preference – either online or paper only. In order to receive electronic 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 OAKS, PA 19456	<input checked="" type="radio"/> Online-Only <input type="radio"/> Paper	<input type="text" value="jdoe@youremail.com"/>	<input type="text" value="jdoe@youremail.com"/>

*Required for Online-Only Statements

Skip

Submit

Step 6

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

SEI New ways. New answers.®

Change Password | Logoff

Accounts ▾ | Reports | Account Tools | Site Options

Select Your Statement Preference

12-Jan-2010 10:16 AM ET

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 "online-only". No changes will be made.

Note: All statements associated with this account will be delivered electronically.

Recipient Address
INHERITED IRA TEST C/O JOHN DOE 1 FREEDOM VALLEY DRIVE OAKS, PA 19456

* Required for Online-Only Statement

Legal Terms and Conditions for Paperless Statement

By selecting the checkbox below, you give your affirmative consent ("consent") to SEI Private Trust Company ("SPTC") 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.

Ok Cancel

Account Created

Your **PortfolioAccess.com** account has now been created so you can access your SEI investment account information online immediately. Beginning with the following statement reporting period, you will receive an email notification rather than a paper statement letting you know that your statement is ready to view.

SEI New ways. New answers.®

Account Created

Print

Congratulations! Your User ID has now been created.

You can now access your account information immediately.

Please use the following URL to access your account:

URL: www.portfolioaccess.com

Please use the below user ID, enrollment code and password to log in to your account. After your initial log in, you will be asked to change your password.

User ID: Jdoe123
Enrollment code: 12345678
Password: mrvswcuxda