

WEALTH MANAGEMENT PLATFORM

ELECTRONIC DELIVERY (E-MAIL) CONSENT FORM

- Client consents to the receipt of all applicable Disclosure Documents* related to their VISION2020 Wealth Management accounts by e-mail.
- Client must provide an accurate and valid e-mail address below.
- Client may opt out of e-mail delivery at any time by sending a written request to the Investment Adviser Representative at the address specified below.

INVESTMENT ADVISER REPRESENTATIVE NAME
INVESTMENT ADVISER REPRESENTATIVE ADDRESS
CLIENT NAME
E-MAIL ADDRESS (PLEASE PRINT CLEARLY)
CLIENT SIGNATURE

*Disclosure Documents may include the Investment Strategy Proposal, Terms and Conditions, Customer Agreement, Client Signature Page, Form ADVs, accompanying Appendices and Privacy Policies.

ELECTRONIC DELIVERY OF WMP DISCLOSURE DOCUMENTS

To expedite the delivery of disclosure documents associated with a new proposal, you will be permitted to e-mail the documents to the client after receiving the client's consent.

Client consent should be obtained by completing the Electronic Delivery (E-Mail) Consent form and obtaining the client signature. Client signature must be obtained before e-mailing the WMP Disclosure Documents, which include:

1. Investment Strategy Proposal
2. Terms and Conditions
3. Customer Agreement
4. Form ADV Part 2A/2B and accompanying Appendices
5. Privacy Policies
6. Client Signature Page

When e-mailing the disclosure documents to the client you must send the e-mail 'Read Receipt' and have 'Platform Disclosure Documents' in the subject line, which will enable easy e-mail retrieval by Supervision/Compliance.

NOTE: If you receive an "Undeliverable" message in response to the sent e-mail, you must then deliver the disclosure documents in hard copy to the client.

The completed consent form should be sent with the rest of the documents to:

Investment Advisory Support
20 E. Thomas Road
Suite 2000
Phoenix, AZ 85012
Fax: 855-635-1204