

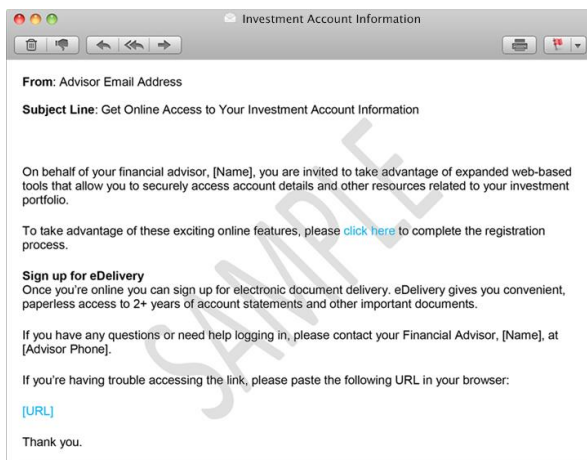
Paperless Statements With AssetMark

Choosing paperless gives you the flexibility to securely store and safely access your important documents online at any time. When you enroll in electronic delivery, you'll receive your documents as soon as they're available in one secure location.



Set up online profile

Your custom email invitation is your key to accessing AssetMark's online portal, eWealthManager.com.



Sample invitation email

Once you receive your invite, have your account number handy and make sure you set up your online profile within 21 days of receiving the email.

Lost your invite? Contact your financial advisor to send you a new one.



Confirm delivery preferences

Log in to [eWealthManager](#) and select **Client Information** to view current contact information and delivery preferences.

Once you have selected electronic delivery and accepted your delivery preferences, your documents will be accessible in the **Document Vault**.



Easily access your statements online

Log in to [eWealthManager](#) to access your documents online at any time. You can access your quarterly performance review (QPR), plus custody statements and tax documents if your assets are custodied with AssetMark Trust.

You'll have access to 2+ years of account statements and other documents in the Document Vault.

Need to update your contact information?

Log into to [eWealthManager](#) and select **Client Information** to view your current mailing address, phone number and email. Contact your financial advisor if you need to update your contact information

Forgot your password?

On the [login screen](#), select Forgot Password and enter your username.