

ACCOUNT VIEW 2.0

Get more security & convenience with your financial statements

You have the option to go paperless with your documents inside the Account View portal. Within the portal you can sign up for paperless delivery of your tax documents and financial statements – along with many other mailings, in under five minutes.

Why sign up for paperless delivery?

- Going paperless gives you secure and fast access to important documents, including your tax forms, monthly account statements, and more.
- You will receive email notifications as soon as your documents are available and you won't need to wait for the forms to be printed and mailed.
- Plus, going paperless provides easier recordkeeping, with current and past documents all in one location with quick access 24/7.
- Also, did you know that paperless delivery can save more than 120 pieces of paper per year? That's good for the environment, and less paper for you to deal with.

How to sign up for paperless

- Log in to your Account View profile and select “paperless” at the top to select your paperless settings—it takes less than five minutes!
- If you need additional instruction, review the attached how-to guide for details

