

Please download this form, print, and sign. Then 1) Email the completed form to your Relationship Manager OR 2) Upload the form to your wealth portal vault and email your Relationship Manager so they can update your account.



Statement Election

Unless requested otherwise, Trust Point provides quarterly and annual mailed paper statements to all account owners or other parties entitled to statements for all accounts. However, you may elect to receive web statements for some or all of your accounts in lieu of paper statements which can be viewed and downloaded through the Trust Point Wealth Management client portal.

If you elect web statements, Trust Point will send you an email each time a statement is loaded onto your Trust Point Wealth Management client portal. You may access your portal by visiting Trust Point's website at www.trustpointinc.com.

Unless otherwise indicated, this election will apply to all account statements produced for your account(s) at Trust Point. This election will remain in effect until you notify us in writing of a different election.

Election:

- Yes, send me web statements in lieu of paper statements
- No, I prefer to receive paper statements

By selecting yes above, I hereby authorize and give my consent to TRUST POINT INC. to provide statements and/or other information for my Trust Point account(s) electronically. I understand that it is my responsibility to provide notice to Trust Point if I am unable to access my statements, my email address changes, or if wish to change my statement delivery preference. I may revoke this election at any time by notifying TRUST POINT INC. in writing.

Client/Beneficiary Name

Email Address for Web Access/Statements

Client/Beneficiary Signature

Date