Paperless Statement Instructions

*Note: All hyperlinks are active/clickable (ex. **https://www...**)*

Disclosure: For the protection of the client, only actual account owners may switch from paper statements to e-statements, advisors CANNOT do this on the client's behalf.

Account	Instructions
Alliance Petroleum	If the client is setup for direct deposit of distributions, they aren't getting anything in the mail from APC. They can always login and see their account info at **https://www.myalliancepetroleum.com/login.asp** using their owner number as the username, and SSN# (no dashes) as the password
Altegris (APM) Funds	complete/sign the attached form and scan/email to lindsey@planningworks.biz or fax to 512 684-8519. You will then be sent a username/password for the Altegris portal to access your statements, and will receive email notifications every time a new statement is available to view.
American Funds	go to **https://www.americanfunds.com/individual/** and sign in on the right side. Your username is your American Funds account number, your password is the last 4 of your SSN#. Once you have logged in, click on the picture of the green tree that says "Go paperless" & follow the instructions.
ArciTerra	e-statements are not available at this time, they do not know when they will be available
Atlas	Beginning 2013, everyone is now getting e-statements. Clients were mailed a letter at the end of 2012 with their login information.
Behringer Harvard	Go to **http://www.behringerinvestments.com/** and click "Investor Log-in" at the top right, then "Sign up for account access" towards the bottom right. After establishing account, you can select option for paperless statements.
Bradford	do not offer an email statement delivery service, but clients can manually view their statements online at **www.bradfordexploration.com**
Carter Validus Mission Critical	go to **http://www.cvreits.com/** and select your investment, then click "Investor Login" at the top right, then "Create a new User ID and Password" under the Login button. Once you create a username/password then login to sign up for paperless statements.
Chambers Street Properties (formerly CB Richard Ellis)	go to **www.cnl.com/gopaperless** Click the button "Establish User ID" Fill in all of the requested info Once you are logged in, it will ask for you to give your email address, then will ask you what docs you would like to receive paperless – select all docs except Tax Docs. *NOTE – they are still in their "testing phase" of e-statements, you will continue to receive paper statements for awhile, in addition to your e-statements
CNL	go to **www.cnl.com/gopaperless** Click the button "Establish User ID" Fill in all of the requested info Once you are logged in, it will ask for you to give your email address, then will ask you what docs you would like to receive paperless – select all docs except Tax Docs. *NOTE – they are still in their "testing phase" of e-statements, you will continue to receive paper statements for a while, in addition to your e-statements
Cole REIT	go to **http://www.colecapital.com** click Individual Investor, then Account Access at the top, then Individual Account Access, and click "Establish a new User ID and Password". Once you have created a login, then you need to sign-in to your account and select "E-Delivery Options" to subscribe to electronic communications
Cypress	create an account at **https://cypress.phxa.com/** Login, then click Contact Us at bottom, then click Update Profile, then click Electronic Delivery checkbox.
Dividend Capital	create an account at **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=6030821020015** - click the "Establish User ID" link on the left. Then login to select/manage paperless statements.
Franklin Square	go to **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=80517001310181617** Click "Need to establish user ID?" and follow remaining steps. Once logged in, look for the button/link for "electronic delivery consent"
Gentry Mills	email Billy Glass bglass@gentrymillscapital.com the name of the client that wishes to receive e-statements
Hines	create online account at **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=50708130418** then click on "e-delivery consent" on the left hand side of the page to sign up for e-statements.
Inland America REIT	create an account at **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=80813110013030012** then login and click on "Enroll in Electronic Delivery" on the left of the Account Portfolio page
Invesco	create online account at **https://www.invesco.com/portal/site/us/investors/accountaccess** (click Individual Investor Registration towards the bottom). Once you login, click on Service Center tab, then select "Register for eDelivery" and complete the consent process.
James Capital Alliance	JCA does not mail the clients anything directly, clients receive the "network" performance report from FCC along with their monthly FCC statements
KBS	create an account at **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=3100118** Once you login, look for "manage communications" and then select electronic delivery.
LEAF	do not offer electronic statements
Mackenzie Capital Management (MPF)	they do not offer electronic statements or client login accounts.
NEST 529	go to **https://www.nest529advisor.com/neatpl/auth/renderVerify.do** and enter one of your children's acct #s, YOUR social security #, your zip code. Follow the steps to create a username – you will be prompted during the sign up process to enroll in e-statements. *Note – you only have to make one login, you will be able to see all children's accts thru one login.
NetREIT	go to **https://investor.broadridge.com/** then click on "Create Profile" on the right
Northstar Real Estate	go to **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=c131417190718190017271715** and click "register for access"
Penneco	e-statements are not available at this time, they do not know when they will be available
Phillips Edison ARC Grocery Center REIT II	there is an electronic consent section on the application, but per 6/12/14 electronic statements are not being emailed out yet, only paper. Clients can create an account online at **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=80012170400111924** and click "register for access"
Potomac/Fidelity	create online account at – **https://fps.fidelity.com/ftgw/Fps/Fidelity/RtlCust/Resolve/InitNUR** Once you have created an account, go to www.fidelity.com and click "Log In" (top right button). Once you login, you can select the option for paperless statements.

Reef	login at **https://secure.reefogc.com/ContactSecurity/Login** and login to "opt-in" to paperless delivery on K-1's. If a client is receiving distributions via direct deposit, they aren't receiving copies of checks or production reports – only by request.
Resource REIT	click on "Establish User ID" at **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=81704181420170204** Once you login, look for the option to sign up for e-statements on the right side of the page.
Rydex	create an account at www.traderydex.com – click on the "First Time User?" link Once you have created an account, login and select the "paperless statements" link, and follow directions
Tier REIT	go to **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=419080417** click "Establish User ID" at the bottom. After establishing account, you can select option for paperless statements.
Triton Pacific	If the client gives an email address when they sign up, they are defaulted to e-statements. If they do not, they need to call (310) 943-4990 opt. 3 to get an account setup.
UDF	clients can create an acct/view their statements at: **https://www3.financialtrans.com/tf/FANWeb?tx=Disclaim&cz=3200305** however UDF says that DST requires them to mail paper statements to the clients – paper statements cannot be "turned off"
United Mortgage Trust	e-statements are not available at this time, they do not know when they will be available
Virtus	do not offer an e-statement delivery service, but clients can manually view their statements online at **https://www.taxacs.com/virtus/index.html**
Voya	Create account at **https://customer.voya.com/customer/public/ssoregistration** Click "Go Green" icon – will give you option to sign up for e-delivery
VSR/First Clearing Accounts	Go to **https://vsrfinancial.fccaccessonline.com/** Login (if you do not have a username/password, please call Lindsey at 512 498-7526 x.58 to get one setup, takes about 10 minutes) Click "Customer Service" tab at the top Click "My Profile" tab at the top Click "Delivery preferences" tab Check ALL boxes for all of your accounts, EXCEPT "Tax Docs/1099s" (you will still want to receive these in paper form) Click "Submit" at the bottom, follow remaining instructions to link your email address
Waveland	as long as Waveland has an email address on file for the client, they will receive everything paperless.