

SAGEPOINT FINANCIAL ELECTRONIC DELIVERY (E-MAIL) AGREEMENT and CONSENT FORM

SagePoint Financial offers certain communications through electronic delivery. Categories of communications you may receive via e-Delivery include:

- **VISION2020** Wealth Management accounts: Disclosure Documents may include the Investment Strategy Proposal, Terms and Conditions, Customer Agreement, Client Signature Page, Form ADVs, Accompanying Appendices, Privacy Policies.
- Brokerage and Non-Brokerage accounts: Disclosure Documents may include those documents described above as well as product prospectuses.

With providing written consent for e-Delivery of any communications described above, you agree that we may also deliver similar firm documents electronically that may be available now or in the future. In addition, the following terms and conditions will apply to all of your SagePoint Financial (current and future).

- A valid e-mail address is required for our e-Delivery services and you are responsible for notifying your SagePoint Financial when your e-mail address changes; you may update your e-mail address by sending written instructions that include your new e-mail address to your Financial Advisor.
- E-Delivery is effective immediately and may be cancelled at any time by sending a written request to your Financial Advisor at the address specified below.
- E-Delivery services for any of your accounts will automatically apply to any accounts that you open in the future at SagePoint Financial.
- You may request paper copies of any document we are required to deliver to you at any time for no additional charge by contacting your Financial Advisor.
- If your e-mail address fails, we will mail paper copies of documents.
- With e-Delivery services, you confirm that you have access to a printer or other device to print or save documents you may wish to retain.
- We do not charge for e-Delivery, but your Internet access provider may have separate charges.

HARDWARE AND SOFTWARE REQUIREMENTS

In order to receive documents electronically, you will need access to a computer and an account with an email service provider compatible with your email software. You may incur Internet-related costs in connection with electronic delivery, such as the costs charged to you by your Internet Service Provider and local telephone companies for the time you spend on the Internet or the costs associated with printing email notifications and electronic documents. Your email notifications and electronic documents may be made available in either HTML (regular Web hypertext) or Portable Document Format (PDF). Your electronic documents may be viewed electronically via the Web and/or PDF and printed with a local printer. You may also save your electronic documents by storing the hyperlink on your computer or by downloading and saving the documents the way you would any other file from the Internet.

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