Want Less Paper Statements?

Take advantage of online options to reduce the amount of paper you receive and help the environment at the same time!

*e*Money Client Portal

A great way to save paper and monitor your accounts is to take advantage of our complementary *e*Money Client Portal! You can access it thru our Client Tools option on our website. In addition to monitoring your accounts, you can link outside accounts such as your bank account and your personal client vault can be used to send documents to us *and* download documents we send to you. If you do not already have an *e*Money login, or if you have any questions about *e*Money, please contact us at (513) 898-9100 and ask for Juliann Trester.

To go paperless with **Pershing** you must set up an online account. The online account is where Pershing will send your statements, and any other documents that you elect.

- You can set up your login by going to netxinvestor.com and selecting, "register". After registering you can change your preferences by clicking the green, "go paperless" button in the upper righthand corner.
- **Or** you can contact us at (513) 898-9100, and we can send you the form, either through mail or DocuSign, to set up your login and paperless election.

To go paperless with **Charles Schwab** you also must set up an online account. The online account is where Schwab will send your statements, and any other documents that you elect.

- You can set up your login by going to client.schwab.com and selecting, "new user". As you are setting up your login there will be an option to enroll in paperless delivery.
- If you already have a login you can update your delivery preferences by going to the Service menu option, then Account settings > Alert Preferences > Paperless Services
- **Or** you can call Charles Schwab at (800) 515-2157 and have a representative help you update your preferences.

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