

PAPERLESS STATEMENTS

If you have an established AccountView login and would prefer paperless statements, please complete the following steps. Contact Maria Saravia, with any questions regarding the login process or the Accountview features. Maria can be reached via telephone at (847)-590-5555 ext. 108 or email at msaravia@vantagefinancial.com.

- Open your browser to Vantage Financials website: www.vantagefinancial.com.
- Select Investments under the Client Links tab and log in to LPL Account View.
- Click on the Statements tab, then on the Paperless Options button.
- Place a check mark to the left of each account in order to suspend mailing the LPL Financial statement. When all the accounts have been selected, click on Done.
- Once complete, email notices will be sent to the email address on file when account statements are available for viewing. Paper statements will no longer be sent. However, you will still receive trade confirmations and proxies through the mail. This suspension of statements can be cancelled by reversing the steps above.