



ACCESS KEY DOCUMENTS

With Wealthscape Investor, you'll always have access to your statements, confirms, tax documents and correspondence. To view documents:

1. Click **Accounts** and select the account you want to access documents for.
2. Select the **Documents** tab.
3. Select one of the links below the Documents tab for the type of document you want to view.

In addition, you can import your eligible tax forms into TurboTax and H&R Block by accessing those websites directly.

A screenshot of the Wealthscape Investor interface. At the top, it says 'Wealthscape Investor' and 'MML Investors Services'. Below that is a navigation bar with '< Accounts' and 'Corporation (CP)'. There are several tabs: 'Positions', 'Balances', 'Activity & Orders', 'Documents', and 'Profile'. Under the 'Documents' tab, there are links for 'Statements', 'Confirms', 'Tax Documents', and 'Correspondence'. Below this, there is a section titled 'Account Statements & Records (Correspondence) for Go Paperless'. The text in this section says: 'Enroll in electronic delivery for all of your accounts. We'll send you an e-mail alert when your financial documents (e.g., statements and confirms) are available to view online.' There is a link 'Enroll Now' at the bottom of this section.



This material does not constitute a recommendation to engage in or refrain from a particular course of action. The information within has not been tailored for any individual.

Use of the Wealthscape Investor Brokerage Mobile app requires an active Online Brokerage Account.

This information is as of June 30, 2017, is subject to change, and is revised periodically. Companies and trading symbols mentioned are provided for illustrative purposes only and should not be used or construed as an offer to sell, a solicitation of an offer to buy, or a recommendation for any security.

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Securities, investment advisory and financial planning services are offered through qualified registered representatives of MML Investors Services, LLC., Member SIPC. (www.SIPC.org) Supervisory address: 5885 Meadows Parkway, Suite 850, Lake Oswego, OR 97035. Phone (503) 221-1211.

