

CHANGING PERSONAL INFORMATION, DIVIDEND REINVESTMENT ELECTIONS, PRICING PLAN, ADDING A CREDIT CARD FOR BILLING

Choose **Settings** from the main menu. Click the applicable edit button to make changes.

Folio Investing Add Another Account Logout

Accounts **Settings** Statements & Tax Records Market Research Help Search

Settings for Test Account

Your Information [Edit](#)

USERNAME:	testretail02	PHONE:	(703) 555-1212 (day) (703) 555-3434 (evening)
DATE OF BIRTH:	01/01/1971	EMAIL:	smithj@email.com
SSN:	XXX-XX-9685	PRIMARY ADDRESS:	8205 Greenway Ave McLean, VA 22102 US
CITIZENSHIP:	U.S. Citizen	MAILING ADDRESS:	Same as primary address.
W-9 STATUS:	No Withholding		
PASSWORD:	Change		
SECRET QUESTION:	What's my cat's name?		
SECRET ANSWER:	Mr. Sparky		

Employment & Financial Information [Edit](#)

EMPLOYMENT STATUS:	Employed	ANNUAL INCOME:	\$100,001 - \$200,000
COMPANY NAME:	Ace Management	LIQUID NET WORTH:	\$200,001 - \$500,000
COMPANY ADDRESS:	5348 International Drive McLean, VA 22102 US	TOTAL NET WORTH:	\$200,001 - \$500,000
OCCUPATION:	Management	SECURITIES INDUSTRY AFFILIATION:	No
		DIRECTOR, 10% SHAREHOLDER, OR EXECUTIVE WHO MAKES POLICY AT A PUBLIC COMPANY:	No
		ACCREDITED INVESTOR:	No
		PREVIOUS PRIVATE PLACEMENT EXPERIENCE:	No

Your Accounts

My First Folio (MA6211800U)
[CHANGE: Account Name](#) | [Cancel Order Limit](#) | [Security Exclusions](#) | [Select Automated Tax Strategy](#) | [Close Account](#) | [Viewing Preferences](#)

Test 2 Folio (MA6211800U05)
THIS FOLIO IS CLOSED. REGISTRATION: Test Account

Aggressive Folio (MA6211800U07)
[CHANGE: Folio Name](#) [Distribution Investment](#) | [Close Folio](#) ACCOUNT TYPE: Individual ACCESS LEVEL: Account Creator

Aggressive2 Folio (MA6211800U08)
[CHANGE: Folio Name](#) | [Distribution Investment](#) | [Close Folio](#)

[+] VIEW ALL FOLIOS

Watch Account (OB4006500A)
[CHANGE: Cancel Order Limit](#) | [Security Exclusions](#) | [Select Automated Tax Strategy](#) | [Viewing Preferences](#)

Defensive Strategy Folio (OB4006500A07)
[CHANGE: Folio Name](#) | [Close Folio](#)

BetterInvesting Test 1 Folio (OB4006500A04)
[CHANGE: Folio Name](#) | [Close Folio](#)

Pricing Plans
Folio Unlimited Plan - Monthly
[CHANGE: Pricing Plan](#)
[Payment Method](#)
[Account Debit](#)

[Free Watch Folio](#)

Miscellaneous Settings
Message Center Notification Settings
Modify where account related information is delivered

Authorized Access
Manage the access you have given others to your account

Resources
[Help Center](#)
[Tax FAQs](#)
[Forms](#)

Got a Bright Idea for Folio?
[Tell us about it!](#)

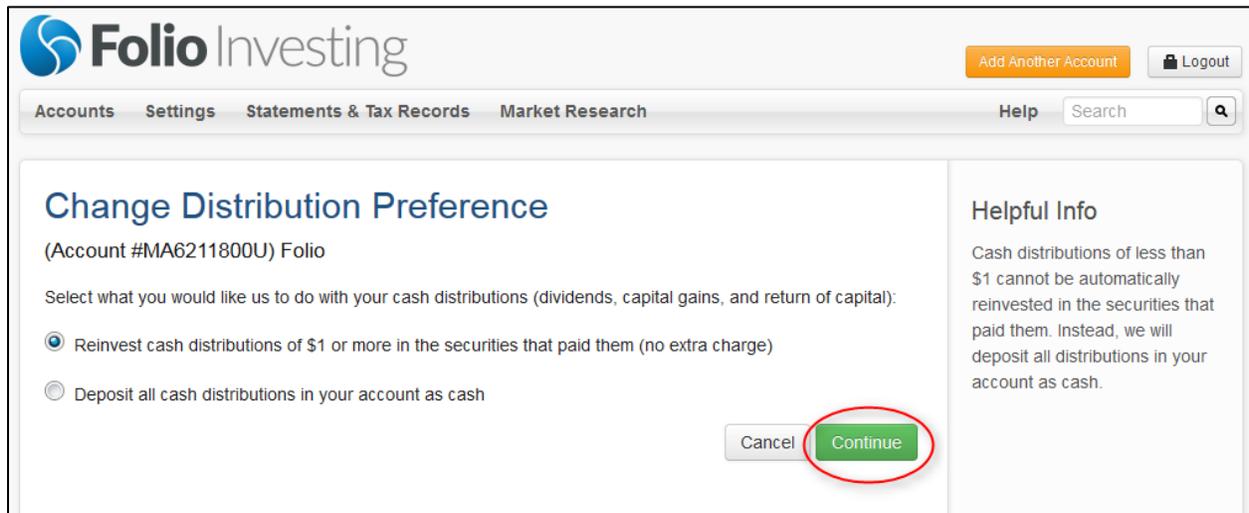
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Specific Instructions for Dividend Reinvestment Elections

You can turn the Distribution Investment feature on or off at a folio level. When the Distribution Investment is turned on for a folio, cash distributions of at least \$1 (such as dividends, capital gains and returns of capital) are automatically reinvested in the securities that paid them in that folio. Note that turning Distribution Reinvestment on or off does not automatically change the folio name – to change the folio name select **Change Folio Name**.

Step 1: After choosing the **Distribution Investment** link below the folio on the **Settings Page** under the *Your Accounts* section the following screen is displayed:



The screenshot shows the 'Change Distribution Preference' screen for account #MA6211800U. The page title is 'Change Distribution Preference' and the subtitle is '(Account #MA6211800U) Folio'. The main instruction is 'Select what you would like us to do with your cash distributions (dividends, capital gains, and return of capital):'. There are two radio button options: 'Reinvest cash distributions of \$1 or more in the securities that paid them (no extra charge)' (selected) and 'Deposit all cash distributions in your account as cash'. At the bottom right, there are 'Cancel' and 'Continue' buttons, with the 'Continue' button circled in red. A 'Helpful Info' section on the right states: 'Cash distributions of less than \$1 cannot be automatically reinvested in the securities that paid them. Instead, we will deposit all distributions in your account as cash.'

Step 2: Make the desired selection and choose **Continue**.



The screenshot shows the 'Change Account: Review' screen. The page title is 'Change Account: Review' and the subtitle is 'Please confirm that you want to make these changes.'. At the bottom right, there are 'No' and 'Yes' buttons, with the 'Yes' button circled in red.

Step 3: Choose **Yes** to save your changes.

Specific Instructions for Changing a Pricing Plan, Adding a Credit Card for Billing and Changing Account from Which to Deduct Fees

Select the appropriate link on the **Settings** page under the **Pricing Plan** section.

- To review or change your pricing plan, choose the **CHANGE: Pricing Plan** option.
- To add a credit card to bill your monthly or annual fee, choose the **CHANGE: Payment Method**. You will be prompted to enter a credit card.
- If you have more than one account and wish to select a specific account from which to deduct fees, choose **CHANGE: Account Debit**.