

How to view your statements on Shareholder Account Manager (SAM)

If you are a shareholder who has signed up for Electronic Delivery of Statements and non-tax related documents, you are able to view and print year-end statements generated since 2005 on your account on our website 24 hours a day, 7 days a week. In addition, any quarterly statements (in color) produced since you signed up for Electronic Delivery will be available online as well. For year-end statements prior to 2005, please contact a PFS Investments Inc. ("PFSI") Service Representative at (800) 544-5445. We are open Monday through Friday 8 am – 8 pm.

If you need to sign up for Electronic Delivery of Statements see [How to Sign Up for E-Delivery](#).

Log in to [Shareholder Account Manager \(SAM\)](#) from the 'Account Summary' screen click on 'Statements'. All available statements (back to 2005) will be listed on this screen.

The screenshot shows the PRIMERICA Shareholder Account Manager (SAM) interface. At the top is the PRIMERICA logo. Below it is a navigation bar with tabs: Account Summary (selected), Account Profile, Trade, Agent Tools, and Fund Information. Underneath are sub-tabs: Account Search, Account List, Overview, Position Detail, Statements (selected), History, and Actions. A secondary navigation bar includes: Quarterly Statements (selected), Tax Forms, Transcript, Account Performance, and Average Cost. The main heading is 'Online Statements'. Below this is an information icon and text: 'For year end statements prior to 2005, please contact a PFSI Service Representative for further assistance'. A table titled 'Quarterly Account Statements' is displayed with the following data:

Year	Type	Action
2016	Year End Statement	VIEW
2015	Year End Statement	VIEW
2014	Year End Statement	VIEW
2013	Year End Statement	VIEW

Click on 'View' to bring up a new window with a .pdf file* showing your statement.

*Adobe™ Acrobat Reader is required to open these files. Please visit www.adobe.com if not already installed.



Year-To-Date Statement

January 01 through December 31, 2016
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WINNIECUB
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If you need to print a copy of your statement, select the printer icon on the file or right-click on the screen and select print from the drop down menu that appears.

The screenshot shows a financial statement interface for a "Non-Retirement Account". The main content area is titled "Non-Retirement Summary" and includes sections for "Activity Summary" and "Asset Allocation". The "Activity Summary" section shows a table with columns for "Beginning Value as of 04/01/17", "Purchases*", "Withdrawals*", "Fees", "Dividends and Capital Gains Reinvest", and "Ending Value as of 06/30/17". A red arrow points to a printer icon in a toolbar below the table. To the right, the "Asset Allocation" section states "Your portfolio is 100% invested in Bond/Income." and includes a graph with the caption "This graph compares the market value of your".

On the right side of the interface, there is a "Quarterly Statement" header for the period "April 1, 2017 - June 30, 2017" with account number "1111111111". Below this is a "Thank you for going Paperless!" message. A context menu is open, listing various actions: "Back", "Forward", "Reload", "Save as...", "Print..." (highlighted with a red box), "Cast...", "Translate to English", "Rotate clockwise", "Rotate counterclockwise", and "Inspect".

You also have the option of saving a copy of the statement to your computer or device by selecting the "Save" icon

This screenshot is identical to the one above, showing the same financial statement interface. However, in this version, a red box highlights the "Save" icon (represented by a floppy disk) in the toolbar, instead of the printer icon. The rest of the interface, including the "Activity Summary" table, "Asset Allocation" section, and the "Quarterly Statement" header, remains the same.