

## How to sign up for Electronic Delivery

Primerica Shareholder Services currently offers electronic delivery of Quarterly Statements and Non-Tax related documents as well as Tax Forms.

You may sign up on our [Shareholder Account Manager](#) site, after you log in go to **'Account Profile'**, click on **'User Profile'**, then click on **'E-mail and Electronic Delivery'**, and then click on **'Edit'**. The **'Change User Profile'** window will open and you will need to enter your email address and confirm the email address then you may elect for electronic notification of Tax forms and statements.

The screenshot shows the Primerica Shareholder Account Manager interface. At the top left is the Primerica logo. Below it is a navigation menu with tabs: Account Summary, **Account Profile**, Trade, Fund Information, and Help. Under the Account Profile tab, there are sub-tabs: Account Record, Account Options, Bank Drafts/Payments, and **User Profile**. Below the User Profile tab, there are links: **E-mail and Electronic Delivery**, Change Password, Security Image, and Challenge Questions. The main content area is titled "E-mail and Electronic Delivery Options" and contains a "Current User Profile" section. This section has three main areas: "E-mail address:", "Tax Form delivery preference:", and "Statement and Non-Tax Related Document delivery preference:". Each area has an "Edit" button. The "E-mail address:" section shows "(none on record)". The "Tax Form delivery preference:" section shows "Standard Mail - tax forms will be delivered via standard mail". The "Statement and Non-Tax Related Document delivery preference:" section shows "Standard Mail - paper statements will be delivered via standard mail". At the bottom left is the Primerica logo and the URL "shareholder.primerica.com". At the bottom right is the text "Your use of this site signifies that you accept our Terms and Conditions of Use."

## Change User Profile

### Current User Profile

Please make any changes desired and, when complete, press the Update button at the bottom of this page to process your request.

**E-mail address :**

We'll use your e-mail address to contact you any time an event merits your attention. For example, if you elect electronic delivery of statements (see below) we'll send you a notification when a new statement is available for viewing online.

Please confirm any e-mail address changes by re-entering below:

**Tax Form delivery preference :**

You may elect to have your tax forms delivered via standard mail or be notified via e-mail when they're available for online viewing.

**E-Notification of Tax Forms** - If you elect E-Notification for your Primerica Tax forms you are **required full enrollment in the electronic delivery for your account statements and any other account related documents related to your account.** We'll send you an e-mail notifying you when your tax forms, statements and any other account related documents are ready for viewing on-line.

**Standard Mail** - paper tax forms will be delivered via standard mail.

**Statement and Non-Tax Related Document Delivery preference :**

Primerica Shareholder Services currently provides electronic delivery for Quarterly Statements and Daily Confirms. In the future other important account related documents will be delivered electronically to you as they become available. You may elect to have your statements and confirms delivered via standard mail or be notified via e-mail when they're available for online viewing.

**Electronic Delivery** - if you elect electronic delivery for your Primerica statements and other non-tax related documents we'll send you an e-mail notifying you when new material is ready for viewing online.

**Standard Mail** - paper statements will be delivered via standard mail.

\*Please note that if your account is part of a consolidated statement then the primary registrant of the lead account in the household controls whether an electronic statement is generated or not. E-mail notifications will be sent to the primary registrant when the electronic statement is available for viewing but any legal registrant (excluding minors) may elect to view available account statements online.

In addition, the primary registrant or responsible party of each individual account must elect to be electronically notified when their respective tax forms are available online; tax form e-notifications are sent only to the primary registered owner of the account regardless of any statement householding in effect.

Enter and confirm your email address where you want notifications.

If wish to be notified of Tax forms electronically you must also elect statement e-delivery below

You may elect to have statements sent by E-delivery here.

Once all elections are made click to save

**'E-notification of Tax Forms'** (note this option requires that signing up for Electronic Delivery of statements and non-tax related documents)

When you click on the circle to elect electronic delivery you will be presented with the **'Electronic Delivery Agreement'**, you should review the disclosure, you may print a copy of the disclosure for you records.

Once you have read the disclosure, if you wish to continue the election you need to check the box next to **'Accept'** under the disclosure window to acknowledge that you have read and understood and consent.

disclosures might be sent to you with your account statements (for example, account

**ACCEPT** - I have read, understand and consent to the above disclosure regarding electronic notification of tax forms and materials. [\[Print a copy for my records\]](#)

If you are signing up for E-notification of Tax Forms you are required to also enroll in Electronic Delivery of Statements and Non-Tax related documents. If you are not enrolling in E-notification of Tax Forms you may still elect to receive Electronic Delivery of Statements and Non-tax related documents electronically and Tax forms by mail.

**Statement and Non-Tax Related Document Delivery preference :**

Primerica Shareholder Services currently provides electronic delivery for Quarterly Statements and Daily Confirms. In the future other important account related documents will be delivered electronically to you as they become available. You may elect to have your statements and confirms delivered via standard mail or be notified via e-mail when they're available for online viewing.

**Electronic Delivery** - if you elect electronic delivery for your Primerica statements and other non-tax related documents we'll send you an e-mail<sup>1</sup> notifying you when new material is ready for viewing online.

**Statement and Non-Tax Related Document Delivery preference :**

**Electronic Delivery Agreement**

PLEASE READ THIS AGREEMENT CAREFULLY BEFORE REGISTERING FOR THIS

ACCEPT - I have read, understand and consent to the above disclosure regarding electronic notification of investment account materials. [\[Print a copy for my records\]](#)

Once you have made your elections then click on **'Update User Profile'**

available account statements online.

In addition, the primary registrant or responsible party of each individual account must elect to be electronically notified when their respective tax forms are available online; tax form e-notifications are sent only to the primary registered owner of the account regardless of any statement householding in effect.

Reminder: To Elect E-Notification of Tax Forms requires enrolling in Electronic Delivery of Statements and Non-tax related notifications, if you click **'Update User Profile'** and have only elected E-Notification of Tax Form then the following notice will appear at the top of the page:

 If you wish to receive e-Notification for tax forms then you must also select the Electronic Delivery of Statements & Non-Tax Related Documents Preference.

If have failed to click **'Accept'** of the discloser(s) then the following error message appears at the top o the page:

 Please confirm that you've read and agreed to the Electronic Delivery Agreement by clicking the ACCEPT check box below. Please confirm that you've read and agreed to the Tax Form Electronic Delivery Agreement by clicking the ACCEPT check box below.

Once you have selected the options you wish to enroll in and have accepted the discloser(s). Then you need to **'Review and Confirm'** the changes you are making; until you click on **'Confirm Changes'** your elections are not saved and may be cancelled or changed until you confirm.

their respective tax forms are available online, tax form e-notifications are sent only to the primary registered owner of the account regardless of any statement householding in effect.

**Your requested changes are not saved until confirmed.**

Please review your changes and, if correct, press Confirm Changes to save your updates. Otherwise, press Change User Profile to make additional changes.

The User Profile will now show your elections, and we will send a welcome email to the email address you provided.

**User Profile**

Account # [REDACTED]  
 Type: Individual

PRIMERICA  
 10000 N. 10th Street  
 Suite 1000  
 Phoenix, AZ 85020-1000  
 (602) 955-1100

Your user profile has been updated as requested.

A welcome email has been sent to your email address of record. Please look for it and future important notifications from Primerica. Thank you for going green!

Once you have enrolled in Electronic Delivery of Statements:

Return to 'Account Summary' and choose "Statements" then 'Quarterly Statements' to view any year end statement from the year 2005 and after. From this point forward, any future quarterly statements will be added and available in full color. Quarterly statements are not kept on file unless you are signed up for E-Delivery at the time they are sent. In the future you will receive an email to alert you when any new quarterly statements are available.

PRIMERICA

Privacy | Important Disclosures | Sign Off | Last Sign On:

Account Summary | Account Profile | Trade | Agent Tools | Fund Information | Help

Account Search | Account List | Overview | Position Detail | **Statements** | History | Activity Summary | Allocations

**Quarterly Statements** | Tax Forms | Transcript | Account Performance | Average Cost

**Online Statements**

*i* For year end statements prior to 2005, please contact a PFSI Service Representative for further assistance at (800) 665-8677.

Year	Type	Action
2016	Year End Statement	VIEW

Customer Service  
 Need Help? Call (800) 544-5445  
 Monday through Friday 8 AM - 8 PM ET

If you have also enrolled in E-Notification of Tax Forms then from the 'Statements' page choose 'Tax Forms'. You may view any tax forms sent out in the past 5 years, and future tax forms will be added as they are sent. In the future you will receive an email alert when new tax forms are available.

PRIMERICA

Privacy | Important Disclosures | Sign Off | Last Sign On:

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Account Search | Account List | Overview | Position Detail | **Statements** | History | Activity Summary | Allocations

Quarterly Statements | **Tax Forms** | Transcript | Account Performance | Average Cost

**Tax Forms**

Account Tax Forms

The following tax forms are available in the selected account. Please note that Primerica Shareholder Services (PSS) is committed to protecting your confidential data. Your online tax forms have been enhanced to display only the last four digits of your tax identification number and account number(s).

Year	Form	Description	Action	Instructions
2016	1099DIV	Dividends and Distributions	VIEW PRINT	1099DIV
2014	1099DIV	Dividends and Distributions	VIEW PRINT	1099DIV

Customer Service  
 Need Help? Call (800) 544-5445  
 Monday through Friday 8 AM - 8 PM ET

Account Owner | My Profile

Account #: [REDACTED]  
 Registration: [REDACTED] [Edit](#)

We hope this has been helpful; we look forward to servicing your needs in the future!