Wealth Management Platform

ELECTRONIC DELIVERY (E-MAIL) CONSENT FORM

- Client consents to the receipt of all applicable Disclosure Documents* related to their VISION2020 Wealth Management accounts by e-mail.
- Client must provide an accurate and valid e-mail address below.
- Client may opt out of e-mail delivery at any time by sending a written request to the Investment Adviser Representative at the address specified below.

INVESTMENT ADVISER REPRESENTATIVE NAME	DATE
INVESTMENT ADVISER REPRESENTATIVE ADDRESS	
CLIENT NAME	
E-MAIL ADDRESS (PLEASE PRINT CLEARLY)	
CLIENT SIGNATURE	

**Disclosure Documents may include the Investment Strategy Proposal, Terms and Conditions, Customer Agreement, Client Signature Page, Form ADVs, accompanying Appendices and Privacy Policies.*

WOODBURY FINANCIAL

Electronic Delivery of WMP Disclosure Documents

To expedite the delivery of disclosure documents associated with a new proposal, you will be permitted to e-mail the documents to the client after receiving the client's consent.

Client consent should be obtained by completing the Electronic Delivery (E-Mail) Consent form and obtaining the client signature. Client signature must be obtained before e-mailing the WMP Disclosure Documents, which include:

1. Investment Strategy Proposal
2. Terms and Conditions
3. Customer Agreement
4. Form ADV Part 2A/2B and accompanying Appendices
5. Privacy Policies
6. Client Signature Page

When e-mailing the disclosure documents to the client you must send the e-mail 'Read Receipt' and have 'Platform Disclosure Documents' in the subject line, which will enable easy e-mail retrieval by Supervision/Compliance.

Note: *If you receive an "Undeliverable" message in response to the sent e-mail, you must then deliver the disclosure documents in hard copy to the client.*

The completed consent form should be sent with the rest of the documents to:

7755 3rd Street North
Oakdale, MN 55128
Fax: 888-369-6586

Note: *A copy of the Electronic Delivery (E-Mail) Consent form must be retained in the client file.*

To stop receiving paper quarterly performance reports ("QPRs") for your Vision2020 Wealth Management Platform ("WMP") account, you agree to accept and receive electronic notification that the QPRs are available online for your retrieval (the "Service"). "You" means the account owner(s) and/or authorized user(s) of the account listed above. "Authorized user" means a person that you have authorized with full access to your account and has been granted a user ID.

By accepting electronic delivery of your WMP QPRs, you are agreeing to the electronic delivery of all WMP QPRs related to your account and the cessation of any paper QPRs.

The QPRs will be available to you online via http://woodburyfinancialservices.netxinvestor.com, a service provided by Pershing LLC (“Pershing"), or a website provided to you by Pershing on behalf of WMP. You will be notified by electronic mail (e-mail) each time your WMP QPR is available to be viewed online. The e-mail notification(s) will be sent to the e-mail address established when registering with this service, or that have otherwise been provided in this agreement. You may modify the e-mail address through the website or by contacting your financial adviser. In the event of an e-mail notification failure we will terminate this arrangement and you will revert to receiving paper documents until such time that you re-enroll.

By accepting this agreement, you affirm that you have a valid e-mail address on record as provided above, have access to the Internet and you are at least 18 years of age. You also affirm that you have installed Adobe Acrobat Reader version 4.0 or higher to view your QPRs. You agree that electronic delivery of QPRs is deemed accepted, regardless of whether a particular document is accessed or viewed. You may print or save a copy of QPRs at any time. You may request a mailed copy of your QPR by contacting your financial adviser.

Your consent to accept electronic delivery of QPRs is effective until revoked by us, Pershing, or you. You may revoke your consent and resume receiving paper QPRs by changing your delivery preferences by following the instructions on the website, or by contacting your financial adviser directly for assistance. Changes to the electronic delivery settings for your accounts may be made by any authorized user, such as a joint account owner. In the event that you lose access to the website, you may contact your financial adviser in order to have your access reinstated, or you may register directly via myedocumentsuite.com.

You expressly agree and acknowledge that your use of the Service is at your sole risk. None of us, Pershing, nor our respective directors, officers, employees, agents, contractors, affiliates, information providers or services warrant that the myedocumentsuite.com or other website service will be uninterrupted or error free.

Neither us nor Pershing warrant the timeliness, sequence, accuracy, completeness, reliability or content of any information with respect to accessing electronic information. The service provided herein is on an "as is," "as available" basis and without warranties including, without limitation, those of merchantability, fitness for a particular purpose or non-infringement other than those warranties which are implied by and incapable of exclusion, restriction or modification under the laws, rules and regulations applicable to this service.

You are responsible for maintaining the confidentiality of your user ID and password, and for restricting access to your computer, and you agree to accept responsibility for all activities that occur under your user ID or password.

You are agreeing to abide by the terms and conditions as they may be amended from time to time by us and communicated in writing to you. Your continued use of either website will constitute your acceptance of the then-current terms and conditions. The terms and conditions of this agreement set forth the entire understanding and agreement between us with respect to the subject matter hereof.

Financial Advisor Name	Date
Financial Advisor Address	
Client Name	
Client Email Address (PLEASE PRINT CLEARLY)	
Client Signature	
Account Number (List One)	

☐ Please check here to continue receiving paper copies of the QPRs through the mail.