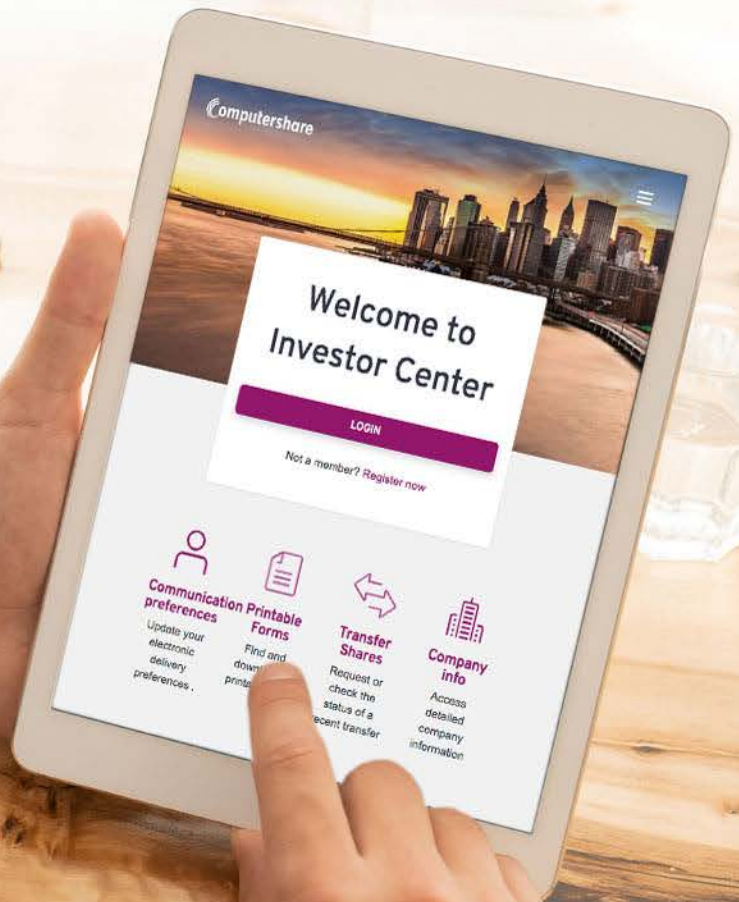


# INVESTOR CENTER USER GUIDE



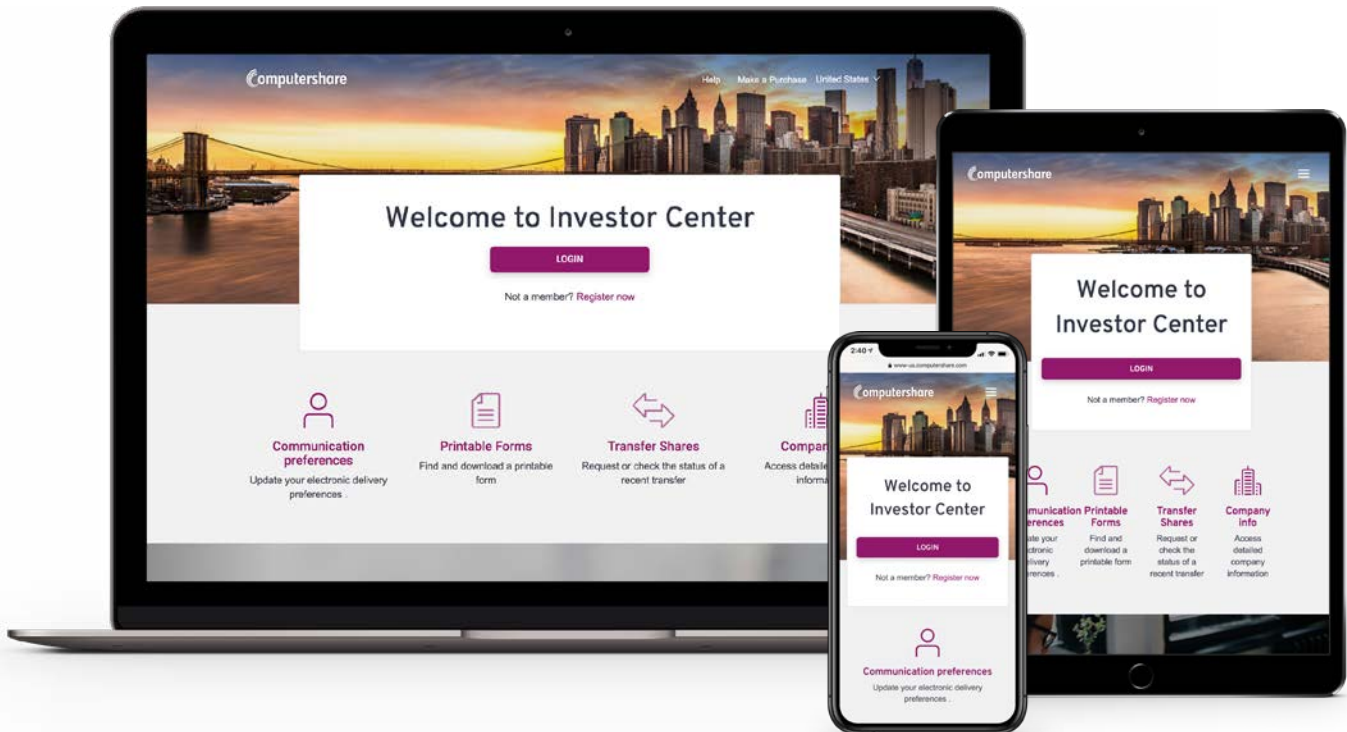
## CONTENTS

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# Investor Center User Guide

## OVERVIEW

Welcome to Computershare's Investor Center™ website. We have designed our shareholder Web application to provide shareholders with easy access to their portfolio of accounts, including historical transaction and payment data, statements, and tax documents. The Investor Center site is available around the clock. User access is secure and designed to allow shareholders to get the most out of their online account management experience.



## GETTING STARTED

Go to: [www.computershare.com/investor](http://www.computershare.com/investor).

First-time users should click the "Register Now" link and follow the steps for creating a unique user ID.

Returning investors simply click "Login" and enter their user ID and password.

## HOW TO REGISTER

If you are a first-time user, you will need to validate your account with us. You can do this by using either your social security/taxpayer number or your account number and providing the requested additional information.

### Option 1 – Social Security number:

- > Social Security number or taxpayer ID
- > ZIP code
- > Ticker symbol or company name

**Confirm your details**

<b>Social Security Number (SSN)</b>	<b>Holder Account Number</b>
-------------------------------------	------------------------------

**Social Security Number or EIN:**

**ZIP Code:**

**Select a company you own shares in:**

### Option 2 – Holder Account Number (US resident)

- > Account number
- > ZIP code
- > Ticker symbol or company name

**Confirm your details**

<b>Social Security Number (SSN)</b>	<b>Holder Account Number</b>
-------------------------------------	------------------------------

**I am a U.S. resident**

I am not a U.S. resident

**Holder Account Number:**

**ZIP Code:**

**Select a company you own shares in:**

## Option 2- Holder Account Number (not a US resident)

- > Account number
- > Last Name
- > Ticker symbol or company name

**Confirm your details**

**Holder Account Number**

I am a U.S. resident  
 **I am not a U.S. resident**

**Holder Account Number:**

**Last Name/Surname/Business Name: (Enter up to 60 characters of the registration including spaces.)**

**Select a company you own shares in:**

# Investor Center User Guide

After accepting the terms and conditions, you will be directed to the "User Set-up" page. There, you will provide your name, email address and mobile phone number for account validation (mobile number is optional). You will also be prompted to create a unique "site seal" by choosing a color and entering three words of your choice. This custom site seal will appear each time you log in as an added layer of verification.

Choose a user ID and password for your account and enter them into the designated boxes. Finally, you will be asked to select three security questions.

Click "Save" to continue to the next step.

## Registration

1 Confirm your stock   2 **User Registration**   3 Confirm your email

---

### Contact Information

First Name  ?

Last Name  ?

Email Address  ?

NOTE: We will send an email asking you to click on a link to confirm the email you enter, so please ensure you have immediate access to your inbox.

User ID  ?

New Password  ?

Re-Enter Password


### Personal Site Seal ?

We require you to set up a personal site seal as an extra layer of security.  
When you see your personal site seal display it confirms you are on the authentic Computershare website. You should only enter your password when you see this image.

Please enter three words below and select a colour to create your site seal.

Enter a different word in each field

Choose a color for your Site Seal image

Site Seal Preview: 

### Security questions ?

Question 1  ?

Answer

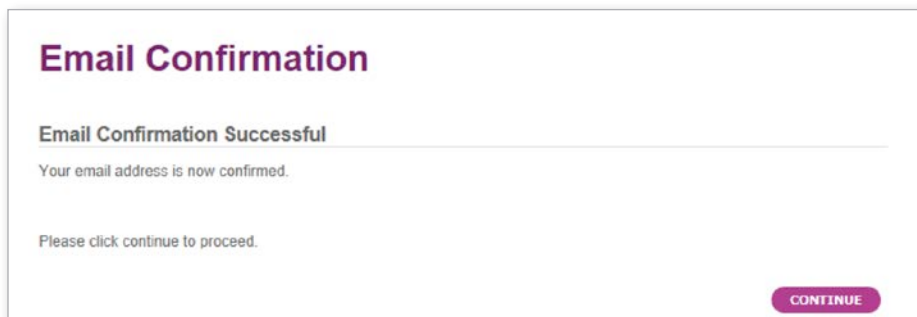
Question 2  ?

Answer





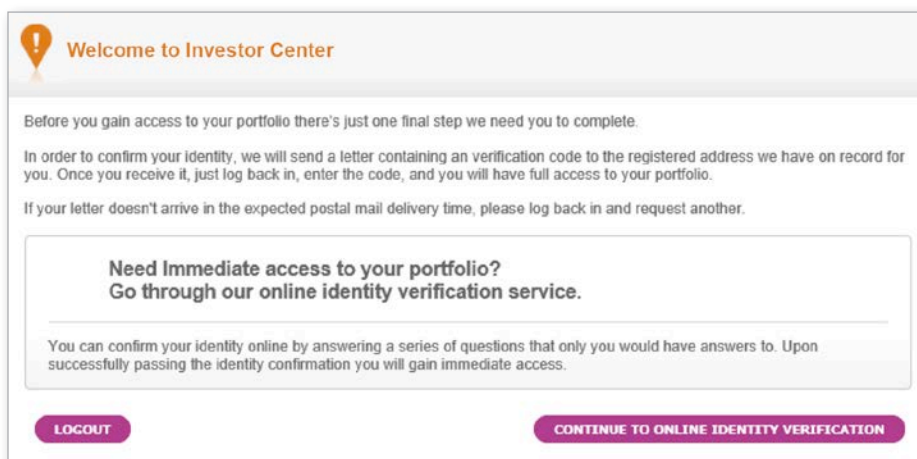
Upon clicking the link you will receive a confirmation that your email address has been confirmed.



Due to regulatory considerations, some accounts meeting certain criteria may need to provide further authentication before gaining full access to their portfolio. If this is the case for you, you will be offered one of two options:

#### Option 1:

If you do not have Social Security number on record in Investor Center, after confirming your email address you will be notified that a verification code is being mailed to you. Once you receive your verification code in the mail, simply log onto the site and enter the code when prompted.





## Option 2:

If you have a Social Security number on record in Investor Center, you will be offered the option to use our online identity verification process. Just verify your Social Security number, name and address and click next to proceed. Using our third party provider, LexisNexis, we will present you with question obtained from public records. Once the questions are answered successfully you will have full access to the site.

If you answer the questions incorrectly, we will simply mail you the verification code as stated in Option 1 above.

## Identity Verification

### Verify Online

To get immediate access to your portfolio, you will need to confirm your identity online. To do this, we use a third party verification service called InstantID provided by LexisNexis.

As part of the online identity verification process you will be asked to answer a series of multiple choice questions with information obtained from public records. Your questions and answers will be encrypted for your protection and will not be stored, accessed or maintained by Computershare or its employees.

Please validate the information below and select 'Next' to continue.

**IMPORTANT NOTE:** Your details below must match those held on public records otherwise no information will be returned and you will not be able to proceed.

Social Security Number

First Name

Last Name

## Identity Verification

### Verify Online - Question

Please select the correct answer from the challenge questions below and select NEXT.

If you do not wish to continue with online verification please select CANCEL and you will be mailed a verification code in the post.

Which of the following corporations have you ever been associated with?

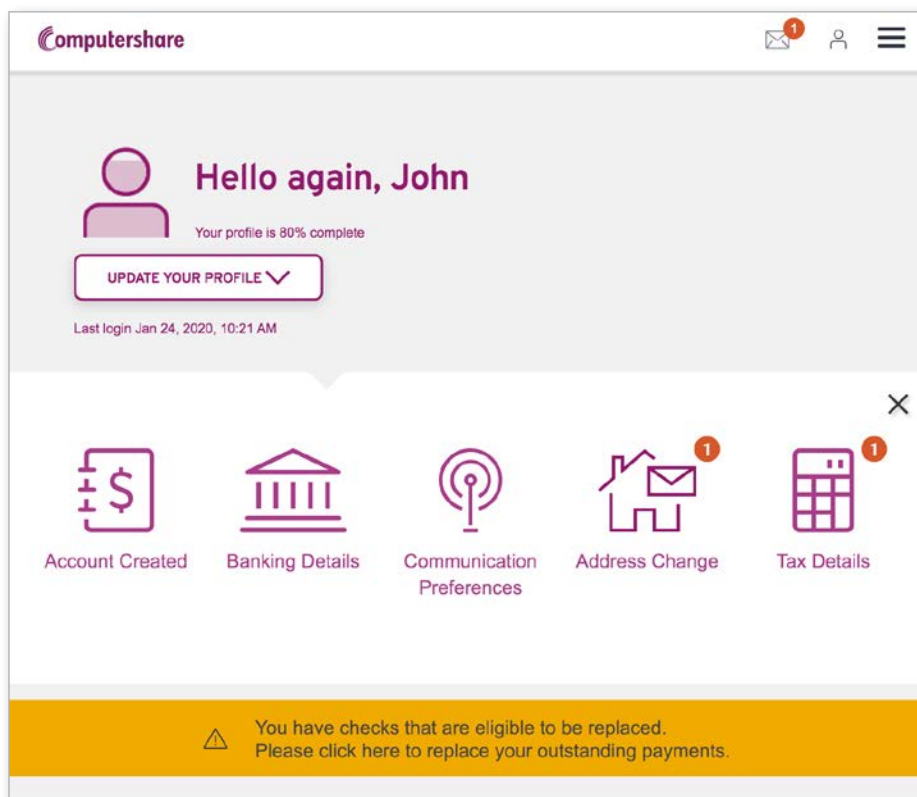
- Verid, Inc
- Business, Inc
- Virtual Compliance, Inc
- Food & Bar, Inc
- None of the above

## ALERTS

Investor Center monitors your accounts and alerts you when there are important items that need to be addressed. You will see a yellow banner at the top of the screen and/or an alert indicator next to the corresponding Profile icon when one or more of your accounts has:

- > Uncashed checks
- > An uncertified tax status
- > An invalid mailing address

Click the banner or icon when you are ready to take action. You will then be taken to the related online wizard to complete your update.



## UPCOMING MEETINGS

You will see alerts when a company in your portfolio is hosting a meeting on Computershare's Investor Vote website. Ready to vote your shares? Click Vote Now for immediate access to the Investor Vote website where you can view or download meeting materials, cast your vote, and set your delivery preferences for future proxy materials. And you won't need to enter your control number.

### Upcoming Meetings

---

Vote Until: Wednesday, May 27, 2020  
WEB TEST COMPANY  
C\*\*\*\*\*1234

[VOTE NOW](#)

---

Vote Until: Thursday, May 7, 2020  
DEMO CORPORATION  
C\*\*\*\*\*1234

[VOTE NOW](#)

## PORTFOLIO

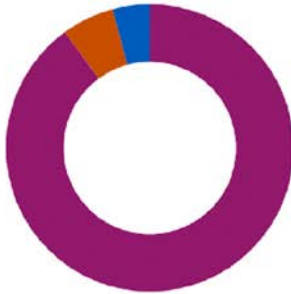
Portfolio is a snapshot of all your holdings with Computershare, including number of shares held, values and related links. Your portfolio is organized by company, so if you own various types of shares in a particular company (certificate shares, registered shares, employee plan shares, etc.), they are all consolidated under the same holding.

**Computershare** ✉ 👤 ☰

### What would you like to do?

- [View and update your profile](#) >
- [View your recent activity](#) >
- [Manage Investment Plans](#) >
- [Search and Buy Stock](#) >
- [Add Beneficiary](#) >

### Investment Summary



ABC	\$27,128.96
DEF	\$1,781.40
XYZ	\$1,259.61

### Portfolio

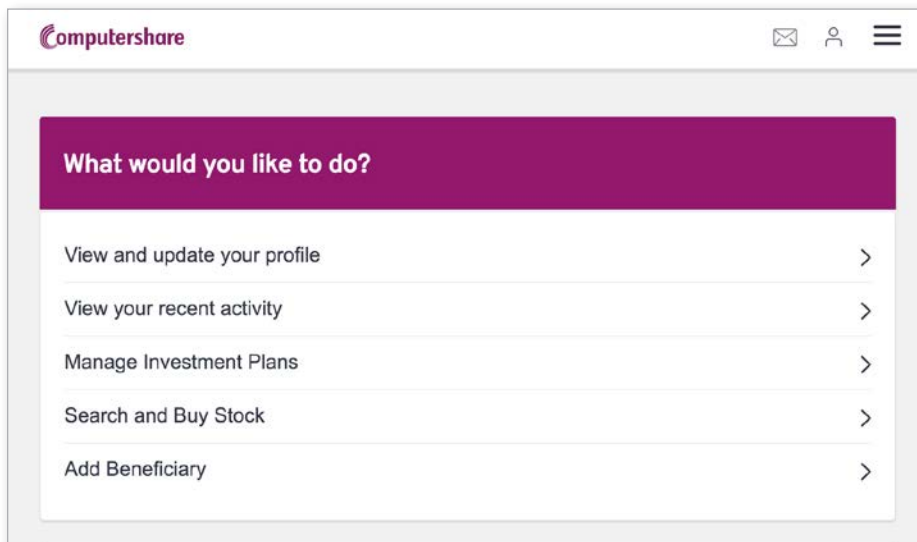
[Hide Zero Balances](#) [Export Balance Letter](#)

**Portfolio Value USD \$30,100.97**

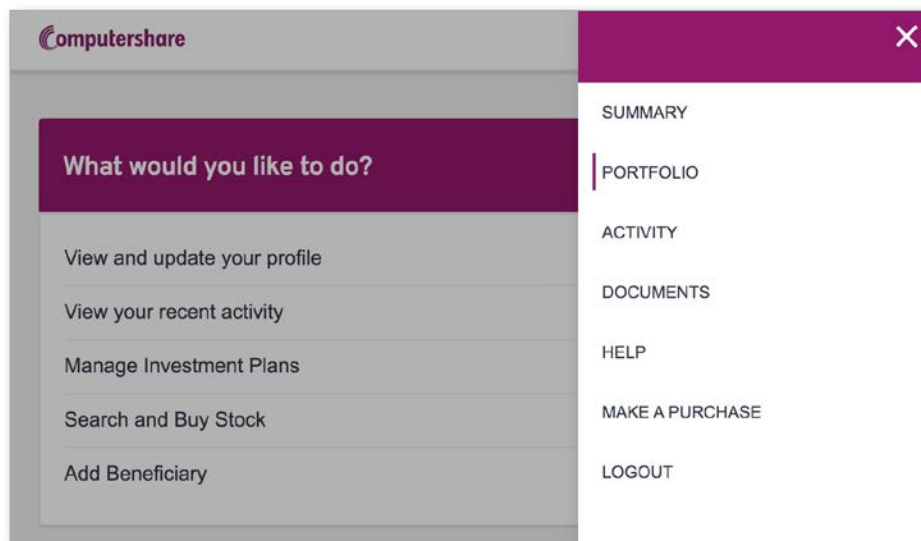
Holdings	Quantity	Price	Market Value
WEB TEST COMPANY (ABC) CLASS B COMMON <a href="#">View Details</a>	9,000	\$3.01 <small>*As of 12/19/2019</small>	\$27,128.96

# Investor Center User Guide

The Portfolio also serves as the launching pad for your Investor Center experience. The “What would you like to do?” menu provides quick access to popular functions.



Click the profile icon or hamburger menu in the top right corner to access other sections of the site. Click the envelope icon to access your messages.



# Investor Center User Guide

## Additional Detail on Holdings

To see additional detail on a particular holding, click on the “View Details” link on the left.

Click the “Actions” link to see a list of the activities available for that type of holding.

You will only see the transactions that are applicable to the selected holding, such as “Sell”, “Buy”, “Transfer Shares” and “Request Certificate”.

The Actions menu also provides access to Documents, Account Details, Payments, Transaction History and Company Information.

Holdings	Quantity	Price	Market Value																																													
WEB TEST COMPANY (ABC) CLASS B COMMON <a href="#">View Details</a>	9,000	\$3.01 *As of 12/19/2019	\$27,128.96																																													
<table border="1"><thead><tr><th>Name</th><th>Share Type</th><th>Quantity</th><th>Value</th><th>Actions</th></tr></thead><tbody><tr><td>JOHN DOE C*****4107</td><td>Book</td><td>5,000</td><td>\$15,050.00</td><td><a href="#">Account details</a></td></tr><tr><td>JOHN DOE C*****4107</td><td>Certificate</td><td>2,000</td><td>\$6</td><td><a href="#">Buy</a></td></tr><tr><td>JOHN DOE C*****4107</td><td>Plan Holdings</td><td>2,000</td><td>\$6</td><td><a href="#">Company Information</a></td></tr><tr><td></td><td></td><td></td><td></td><td><a href="#">Documents</a></td></tr><tr><td></td><td></td><td></td><td></td><td><a href="#">Payments</a></td></tr><tr><td></td><td></td><td></td><td></td><td><a href="#">Sell</a></td></tr><tr><td></td><td></td><td></td><td></td><td><a href="#">Transactions</a></td></tr><tr><td></td><td></td><td></td><td></td><td><a href="#">Transfer Shares</a></td></tr></tbody></table>	Name	Share Type	Quantity	Value	Actions	JOHN DOE C*****4107	Book	5,000	\$15,050.00	<a href="#">Account details</a>	JOHN DOE C*****4107	Certificate	2,000	\$6	<a href="#">Buy</a>	JOHN DOE C*****4107	Plan Holdings	2,000	\$6	<a href="#">Company Information</a>					<a href="#">Documents</a>					<a href="#">Payments</a>					<a href="#">Sell</a>					<a href="#">Transactions</a>					<a href="#">Transfer Shares</a>			
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				<a href="#">Transfer Shares</a>																																												
WEB TEST COMPANY (ABC) REST B REPURCHASE <a href="#">View Details</a>	100																																															



## Add External Holdings

If you have shares held outside of Computershare you may use the Add External Holdings feature to include them in your portfolio balance. Locate the company by ticker or name then enter the number of shares that you own.

Please note that any decrease or increase in you balances entered are not updated automatically as they are not managed by Computershare. You may use the Edit feature to make updates to the balance.

**Add External Holdings** ▾

**Ticker symbol or Company Name:**

**Select Company:**

**Number of Shares/Units Held:**

**ADD**

## Balance Letter

To retrieve a balance letter, simply click on the "Export Balance Letter" link and select the criteria you desire for you letter.

**Portfolio**

[Hide Zero Balances](#)   [↓ Export Balance Letter](#)

This export function creates a letter detailing your Computershare managed holdings as at the date you selected. To view historical statements & tax documents click on the Statements & Documents tab.

Please select the level of information you wish to download:

**Select Account**

**Account Balance as of**

**CANCEL**   **SUBMIT**

## ACTIVITY

The Activity section contains information on dividends and payments, past transactions and pending transactions.

### Dividends & Payments

The account filter allows you to display information for a single account or all accounts. Date filters allow you to focus attention on a financial reporting year or date range of your choice.

You can export a PDF of your dividend and payment history by clicking the “Export to PDF” link (the PDF will contain all information for the filter criteria you selected; if you select all companies and all financial years, the PDF will contain all dividend and payment history for all of your holdings).

The screenshot shows the 'Activity' section of the Computershare investor center. It features three tabs: 'Dividends & Payments' (selected), 'Transactions', and 'Pending Transactions'. Below the tabs are filter options: 'Filter by account' (set to 'WEB TEST COMPANY - John Doe C\*\*\*\*\*4107'), 'Hide Zero Balances', and 'Export to PDF'. There are also date filters for 'Financial year' (set to 'All') and 'Filter by dates' (with 'FINANCIAL PERIOD' selected over 'DATE RANGE'). A dropdown menu shows 'WEB TEST COMPANY' expanded to reveal 'John Doe C\*\*\*\*\*4107'. Below this, a table lists dividend payments with columns for Payment Date, Net, Type, Status, and Action. A total income for 2016/2019 is shown as \$176.17.

Payment Date	Net	Type	Status	Action
12/10/2019	\$23.63	Dividend Check	Uncashed	Actions ▾
9/10/2019	\$21.76	Dividend Check	Paid	View Details
6/10/2019	\$20.05	Dividend Check	Paid	View Details

**Total Income for 2016/2019**  
**\$176.17**

# Investor Center User Guide

Click "View Details" to access additional information for any payment (dividend details, payment details, and taxes and fees as applicable). Misplaced a check? Click "Replace Check" to initiate a check replacement request.

The screenshot displays the Computershare Investor Center interface. At the top, the 'Computershare' logo is on the left, and navigation icons (envelope, person, and menu) are on the right. Below the logo, the 'Activity' section is visible, with tabs for 'Dividends & Payments', 'Transactions', and 'Pending Transactions'. The 'Dividends & Payments' tab is selected. A modal window titled 'Payment Detail' is open, showing information for 'WEB TEST COMPANY' and 'John Doe C\*\*\*\*\*4107'. The modal contains a 'Summary' section with the following details:

Holding	INVESTMENT PLAN
Payment date	9/10/2019
Record date	8/13/2019
Payment type	Dividend
Payment rate	\$0.87
Shares on record date	25.015878
Payment method	Check
Check number	0000000748779

At the bottom of the modal is a purple 'CLOSE' button. Below the modal, a table shows the payment details:

6/10/2019	\$20.05	Dividend	Paid	<a href="#">View Details</a>
		Check		

## Transactions

This area allows you to view and manage your transaction history. The account filter allows you to display information for a single account or all accounts. Date filters allow you to focus attention on a financial reporting year or date range of your choice. You can export a PDF of your transaction history information by clicking the "Export to PDF" button (the PDF will contain all information for the filter criteria you selected; if you select all companies and all financial years, the PDF will contain all transaction history for all of your holdings).

Click the arrow or company name to show/hide the transaction activity pertaining to that company.

**Activity**

Dividends & Payments    **Transactions**    Pending Transactions

Filter by account: [Hide Zero Balances](#)    [Export to PDF](#)

WEB TEST COMPANY - John Doe C\*\*\*\*\*4107

Filter by dates

FINANCIAL PERIOD    DATE RANGE

Financial year: All

▼ WEB TEST COMPANY

**John Doe C\*\*\*\*\*4107**

**CLASS B COMMON**

Date	Transaction	Debit/credit	Balance	Action
7/19/2017	CAPITAL INCREASE	+5000	5000	<a href="#">View Details</a>

**REST B LOCKUP**

Date	Transaction	Debit/credit	Balance	Action
7/19/2017	TRANSFER-(RESTRICTED)	+2000	2000	<a href="#">View Details</a>

**REST B ACT LU AFFILIATE**

Date	Transaction	Debit/credit	Balance	Action
7/19/2017	TRANSFER-(RESTRICTED)	+2000	2000	<a href="#">View Details</a>

# Investor Center User Guide

Click "View Details" to access additional information for any transaction (fees, taxes and cost basis as applicable).

Summary		Fees	
Transaction	Purchase	Amount received	\$25.00
Transaction date	4/22/2020	<b>Fees</b>	
Settlement date	4/24/2020	Trading charges	\$0.05
Holding	DIRECTSTOCK	Brokerage fee	\$0.00
Shares	+0.764368	Handling fee	\$0.00
Price	\$26.10	Check charge	\$0.00
FMV	\$26.10	Wire charge	\$0.00
Exchange rate	0	Direct banking charge	\$5.00
Amount received	\$25.00	Courier charge	\$0.00
Total fees	\$5.05	Amount invested	\$19.95
Amount invested	\$19.95		

Cost Basis and Tax Information Summary	
Type	Covered
Shares	0.764368
Proceeds	\$0.00
Cost Basis	\$19.9882

Share Lot Details	
Original Date	4/22/2020
Transaction Type	PURCHASE
Original Price	\$26.10
Shares	0.764368
Type	Covered
Cost Basis	\$19.9882

## STATEMENTS AND DOCUMENTS

This area allows you to view and manage various statements and documents for your holdings. Click the View PDF button to view, download or print any document.

Computershare

Statements & Documents

Hide Zero Balances

▼ WEB TEST COMPANY

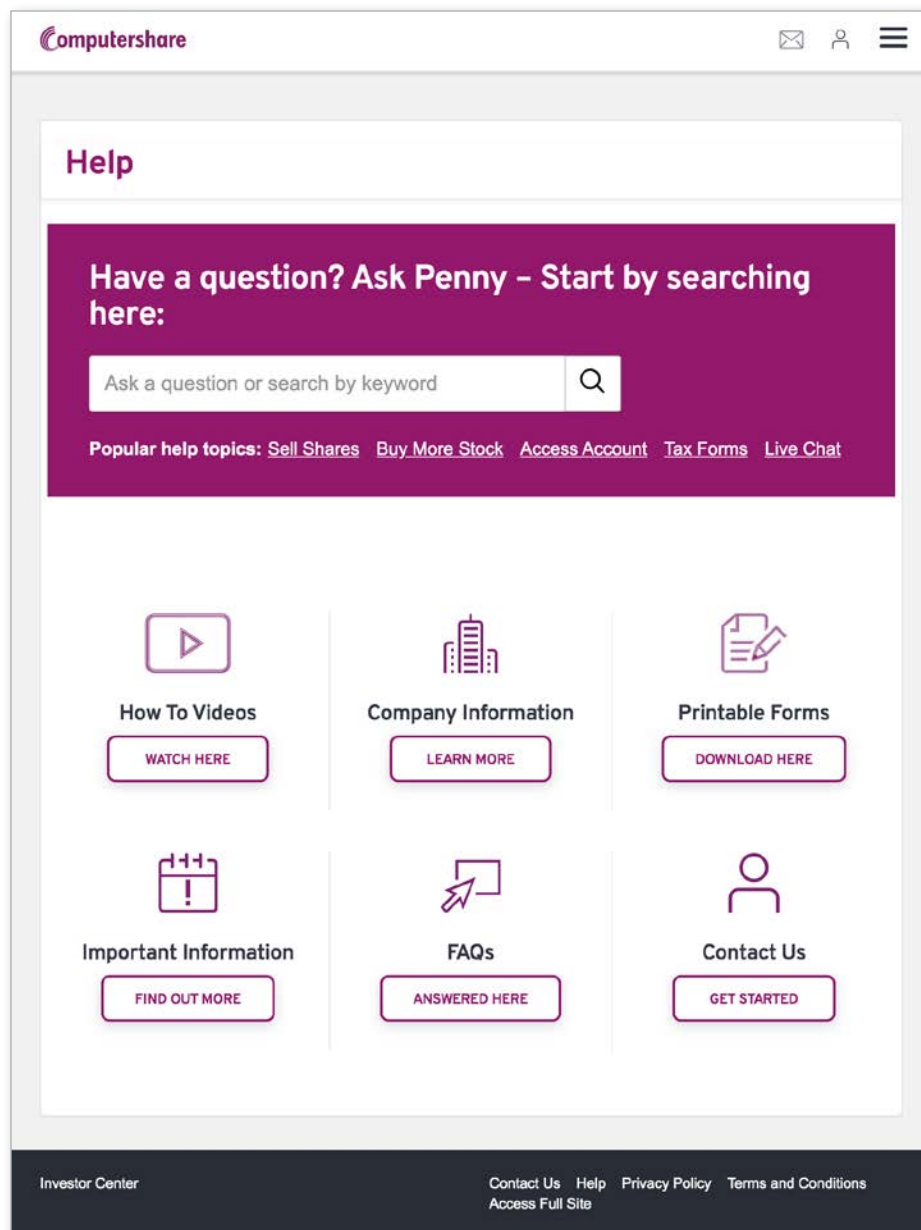
**John Doe C\*\*\*\*\*4107**

Date	Type	Action
11/20/2019	Tax Statement	<a href="#">↓ VIEW PDF</a>
6/20/2019	Account Details Confirmation	<a href="#">↓ VIEW PDF</a>
12/20/2018	Statement	<a href="#">↓ VIEW PDF</a>
11/21/2018	Tax Statement	<a href="#">↓ VIEW PDF</a>



## HELP

Within the Help section you can watch how-to videos, research company information, download printable forms, see answers to frequently asked questions, view contact information, or ask Penny our virtual assistant a question.



# Investor Center User Guide


## Company Information

You can learn more about the companies you are invested in, or obtain information on companies you are considering investing in, by going to the “Company Research” section of the Investor Center site. Simply type in the ticker symbol or company name to begin your search.

### Company Information

Ticker Symbol or Company Name

Information for the company you select will appear on the screen, including market price (and an option to view even more detailed market information on the company), any upcoming corporate actions or events, and company forms.

**\$77.54** USD ▲ DEMO COMPANY  
As of 1/28/2020 2:56 PM ET (NYSE: DEMO) 

### Market Information

COMMON NEW			1/27/2020
Close	High	Low	Volume
\$76.71	\$78.13	\$76.78	7052580

[View More Market Price Graphs and Information](#)  
Market Data Provider

### Company Forms

Deceased Transfer Package – For Non-U.S. Holders	<a href="#">VIEW FORM</a>
Deceased Transfer Package – To transfer shares only if the original account holder has passed away	<a href="#">VIEW FORM</a>
Direct Registration Transaction Request Form	<a href="#">VIEW FORM</a>
DRS Information	<a href="#">VIEW FORM</a>

## MY PROFILE

Access My Profile to view or update the following account information::

### Address Change

Update addresses for any of your holdings.

**Computershare**

**My Profile**  
Your profile is 80% complete

**Address Change**

1 Step 1: Select holding(s) to update   2 Step 2: Provide new address   3 Review

To change your address please complete the following steps below and click on Next. Changing an address will limit your ability to submit a sale request for up to 10 days during this period.

- Select All**
- Investor Center Membership**  
1054 ROYALL ST, #2 CANTON MA 02021 UNITED STATES
- WEB TEST COMPANY - JKY2\_TST**  
C\*\*\*\*\*4107  
1054 ROYALL ST #2 CANTON MA 02021 UNITED STATES

**CANCEL**   **NEXT >**

**Address Change** >

**Banking Details** >

**Communication Preferences** >

**Tax Details** 1 >

**Manage Account** >

**Text Communications** >

## Banking Details

Provide account and routing numbers for direct deposit or wire transfer of payments and dividends.

**Computershare**

**My Profile**  
Your profile is 80% complete

Address Change >

**Banking Details** >

Communication Preferences >

Tax Details >

Manage Account >

Text Communications >

Sell Your Shares >

**Banking Details**

1 **Select Payment Method** 2 Details 3 Review

**WEB TEST COMPANY**  
SAM SAMPLE  
C\*\*\*\*\*1234

**Select Payment Method**

Review your existing banking information below. To make changes, or to set up your banking information, complete the form below.

For your security, changing or implementing electronic banking instruction will limit your ability to receive your sales proceeds electronically for 10 days.

Please Select...

[View Current Banking Instructions](#) [View Fees](#)

**CANCEL** **NEXT >**

## Communication Preferences

Enroll in electronic communications to receive documents electronically rather than via mail, reducing environmental impact.

**My Profile**  
Your profile is 80% complete

Address Change >

Banking Details >

**Communication Preferences** >

Tax Details 1 >

Manage Account >

Text Communications >

Sell Your Shares >

User Preferences >

### Communication Preferences

Use a different email (please specify below)  
 Use same email as Investor Centre Membership

Email Address:

All future security communications will be sent to your nominated email address.

**SUBMIT**

Account Communication Preferences

Company Name	Account Number	Status	Email Address	Action
WEB TEST COMPANY	C*****41 07	None		<a href="#">Edit</a>

I consent to receive all company communications, where eligible, for the holdings in my portfolio by email to the email address above. If any holdings are added to my portfolio, company communications for those holdings will also be sent by email.

You may change your communications preferences at any time.

You can view the Terms and Conditions for Communication Preferences [here](#).

## Tax Details

Complete US tax certification online.

**Computershare**

**My Profile**  
Your profile is 80% complete

- Address Change >
- Banking Details >
- Communication Preferences >
- Tax Details** ⓘ >
- Manage Account >

### Portfolio Tax Status

Shown below is the status of tax details for each account in your portfolio. Highlighted below are one or more accounts that require action. Please select the applicable Action button to update your details.

**Action needed:**  
Action is required to update your tax details for the accounts in the table below.

Holding	Account	Status	Action
WEB	JOHN DOE	Not	<b>CERTIFY TAX STATUS</b>
TEST	C*****4107	certified	
COMPANY			



## Text Communications

Enroll to receive text alerts regarding your holdings.

The screenshot shows the Computershare website interface. At the top left is the Computershare logo. At the top right are icons for an envelope, a person, and a hamburger menu. On the left side, there is a 'My Profile' section with a purple header and a white background. It shows 'Your profile is 80% complete' and a person icon. Below this are several menu items with right-pointing chevrons: 'Address Change', 'Banking Details', 'Communication Preferences', 'Tax Details' (with a yellow information icon), 'Manage Account', 'Text Communications' (highlighted in purple), 'Sell Your Shares', and 'User Preferences'. The main content area is titled 'Text Communications Enrollment'. It features a 'Mobile Number' input field. Below that is a section titled 'Text Notification Information' with a paragraph of text explaining the enrollment process. A checkbox is present, followed by a detailed consent statement. At the bottom of this section is a purple 'SUBMIT' button with a right-pointing chevron.

**Computershare**

**My Profile**  
Your profile is 80% complete

Address Change >

Banking Details >

Communication Preferences >

Tax Details ⓘ >

Manage Account >

**Text Communications** >

Sell Your Shares >

User Preferences >

### Text Communications Enrollment

Mobile Number

Text Notification Information

To enroll in text message services for the holdings in your portfolio please enter your mobile number above and agree to the terms and conditions below.

By checking this box, I consent to receive transactional, informational and marketing texts from Computershare (including on behalf of its securities issuer clients) regarding all accounts maintained at Computershare now and in the future, at the mobile phone number provided above. If any of my accounts at Computershare are joint accounts, I hereby confirm the other joint holder(s) have reviewed and agree to this consent. I agree it is my responsibility to notify Computershare of any changes to my mobile phone number. I understand this consent is not a condition of any service to be provided by Computershare.

**SUBMIT** >

## SELLING SHARES

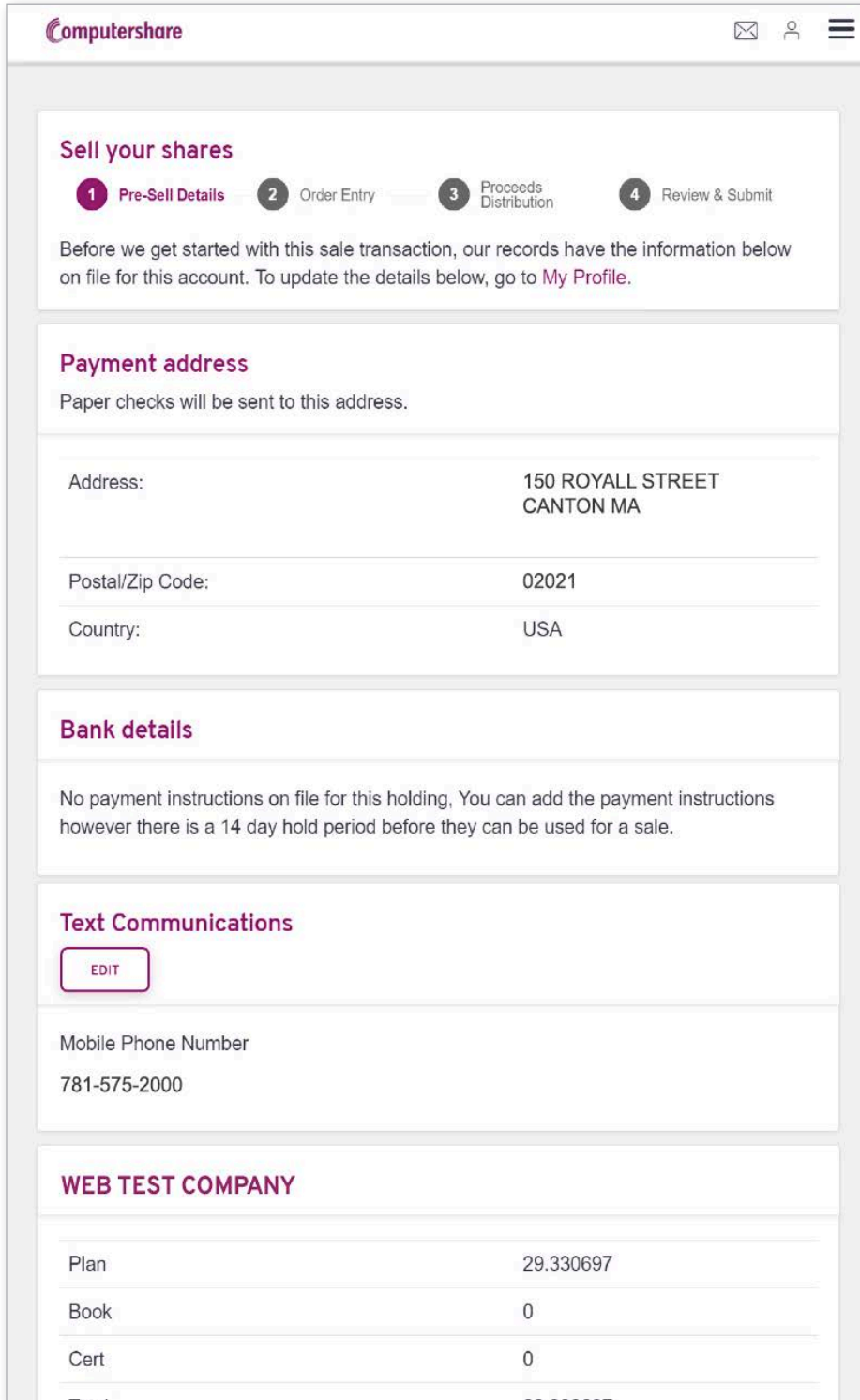
Selling shares is easy through the Investor Center website. From your portfolio, click on the holding you wish to sell from, go to the "Actions" drop-down menu on the right and click "Sell."

Holdings	Quantity	Price	Value																					
WEB TEST COMPANY (ABC) CLASS B COMMON <a href="#">View Details</a>	9,000	\$3.01 *As of 12/19/2019	\$27,128.96																					
<table border="1"><thead><tr><th>Name</th><th>Share Type</th><th>Quantity</th><th>Value</th><th>Actions</th></tr></thead><tbody><tr><td>JOHN DOE C*****4107</td><td>Book</td><td>5,000</td><td>\$15,050.00</td><td><a href="#">Account details</a></td></tr><tr><td>JOHN DOE C*****4107</td><td>Certificate</td><td>2,000</td><td>\$6</td><td><a href="#">Company Information</a></td></tr><tr><td>JOHN DOE C*****4107</td><td>Plan Holdings</td><td>2,000</td><td>\$6</td><td><a href="#">Convert Class</a></td></tr></tbody></table>	Name	Share Type	Quantity	Value	Actions	JOHN DOE C*****4107	Book	5,000	\$15,050.00	<a href="#">Account details</a>	JOHN DOE C*****4107	Certificate	2,000	\$6	<a href="#">Company Information</a>	JOHN DOE C*****4107	Plan Holdings	2,000	\$6	<a href="#">Convert Class</a>				<a href="#">Documents</a>
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				<a href="#">Sell</a>																				
				<a href="#">Transactions</a>																				
				<a href="#">Transfer Shares</a>																				

 100 |  |  || WEB TEST COMPANY (ABC) REST B REPURCHASE [View Details](#) |  |  |  |

From here, you will be walked through a simple, four step process to sell shares.

1. **Pre-sell details.** Confirm that your address and banking information is correct before clicking “Next.”



**Computershare** ✉ 👤 ☰

## Sell your shares

1 **Pre-Sell Details** 2 Order Entry 3 Proceeds Distribution 4 Review & Submit

Before we get started with this sale transaction, our records have the information below on file for this account. To update the details below, go to [My Profile](#).

### Payment address

Paper checks will be sent to this address.

Address:	150 ROYALL STREET CANTON MA
Postal/Zip Code:	02021
Country:	USA

### Bank details

No payment instructions on file for this holding, You can add the payment instructions however there is a 14 day hold period before they can be used for a sale.

### Text Communications

[EDIT](#)

Mobile Phone Number  
781-575-2000

### WEB TEST COMPANY

Plan	29.330697
Book	0
Cert	0
Total	29.330697

2. **Order Entry.** Specify the amount of shares you wish to sell (by number of shares or dollars) and the order type. Click "Next."

The screenshot displays the 'Sell your shares' interface on the Computershare website. At the top left is the Computershare logo. In the top right corner, there are icons for an envelope, a person, and a hamburger menu. Below the logo, the title 'Sell your shares' is followed by a progress indicator with four steps: 1. Pre-Sell Details (checked), 2. Order Entry (highlighted in purple), 3. Proceeds Distribution, and 4. Review & Submit. The main content area is titled 'Share Type - Plan Holdings' and includes the text 'All sales are subject to the Terms and Conditions of the plan.' Below this are two buttons: 'VIEW PLAN DOCUMENT' and 'VIEW FEES'. A section titled 'How many shares do you wish to sell?' shows '29.330697 shares are available to sell' and 'Current Share Price \$60.82 As of 2/13/2020 3:00 PM'. There are three radio button options: 'Sell all' (selected), 'Specify quantity', and 'I want to specify the amount that I am looking to receive'. Below these is a dropdown menu for 'Select Sell order type' with 'Market order' selected. At the bottom of the form are two buttons: '< BACK' and 'NEXT >'. A link 'Or you can cancel this transaction' is located at the very bottom of the form area.

3. **Proceeds distribution.** Select how you wish to receive your payment (check, ACH deposit, etc.) and your preferred delivery method. After making your selections, click "Next."

The screenshot shows the 'Sell your shares' process in the Computershare system. At the top, the Computershare logo is on the left, and navigation icons (envelope, person, and menu) are on the right. Below the logo, the title 'Sell your shares' is displayed. A progress bar shows four steps: 'Pre-Sell Details' (checked), 'Order Entry' (checked), '3 Proceeds Distribution' (active), and '4 Review & Submit'. The main content area is titled 'Share Type - Plan Holdings'. Underneath, the question 'How would you like your proceeds distributed?' is followed by the text 'Your proceeds can be distributed to you by check.' Below this, there is a 'check' label and two dropdown menus. The first dropdown menu is set to 'USD check' and the second is set to 'via postal mail'. A 'Sale Confirmation' section states 'You will receive a text confirmation to 781-575-2000'. At the bottom, there are two buttons: '< BACK' and 'NEXT >'. Below the buttons, it says 'Or you can [cancel this transaction](#)'.

4. **Review and Submit.** This page provides a recap of your sale, including your total proceeds after all applicable fees.

**Computershare**

## Sell your shares

✓ Pre-Sell Details    ✓ Order Entry    ✓ Proceeds Distribution    **4 Review & Submit**

### Share Type - Plan Holdings

Please confirm all order details shown below are correct. This estimate is based on a 20 minute delayed quote, however, your actual proceeds are determined by the price of the security when your trade is executed.

Your shares will be sent directly to the market for sale upon acceptance of your request. However, due to market conditions, there is no guarantee that your order will be executed. There may be instances where your request is not executed or only partially executed.

#### Confirmation of Order Details

Date	2/13/2020
Quantity	29.330697
Order Type	Market order
Currency	USD
Proceeds Distribution	Check
Automated Sale confirm	SMS : 781-575-2000

To confirm the sale, click the check box acknowledging the terms and conditions, and type "YES" into the authorization box (this final step prevents inadvertent sales).

I acknowledge that my sale will be conducted according to the terms and conditions of the sales plan.

In order to submit this sale request, please type in the word "YES" to confirm that you are authorizing this sale. ALL LETTERS MUST BE IN UPPERCASE.

5. **Confirmation.** This final page confirms your order and can be printed for your records.

## BUYING SHARES

Whether you want to buy more shares of an existing company or invest in a new one, it's easy with DirectStock.

### Plan Management

Click "Buy" from the account action menu for immediate access to the DirectStock Plan Management page. Click "Buy More" when you want to purchase additional shares an existing account. Click "Modify" when you want to alter the bank account, frequency or amount of a recurring investment, or if you want to update your dividend reinvestment parameters. Click "Terminate" when you want to stop participating in the plan.

The screenshot displays the 'Plan Management' page for a user named John Doe. The page title is 'Computershare | Plan Management' and the user's name 'John Doe' is visible in the top right corner. Below the title, there is a section titled 'Select a plan to modify your elections'. A brief description states: 'With the new Investor Center Plan Management feature, you can view, update and manage your plan participation and investments for all your companies.' Below this is a table with three columns: 'Company / Account', 'Enrollment Status', and 'Investment Details'. The table lists three plans: 'WEB TEST COMPANY', 'DEMO COMPANY', and 'ABC COMPANY'. Each plan has a corresponding action button: 'BUY MORE', 'MODIFY', 'TERMINATE', and 'VIEW PLAN'. At the bottom of the page, there are two buttons: 'RETURN TO MY PORTFOLIO' and 'BUY MORE STOCK'.

Company / Account	Enrollment Status	Investment Details
⊕ WEB TEST COMPANY C*****1234 Direct Stock Purchase Plan	Not enrolled	N/A
⊖ DEMO COMPANY C*****5678 Direct Stock Purchase Plan	All Dividend Paid In Cash	\$50.00 Monthly on the 15 <sup>th</sup> From Checking *****1234
⊕ ABC COMPANY C*****7890 Direct Stock Purchase Plan	Full Dividend Reinvestment	\$50.00 Monthly on the 25 <sup>th</sup> From Checking *****1234

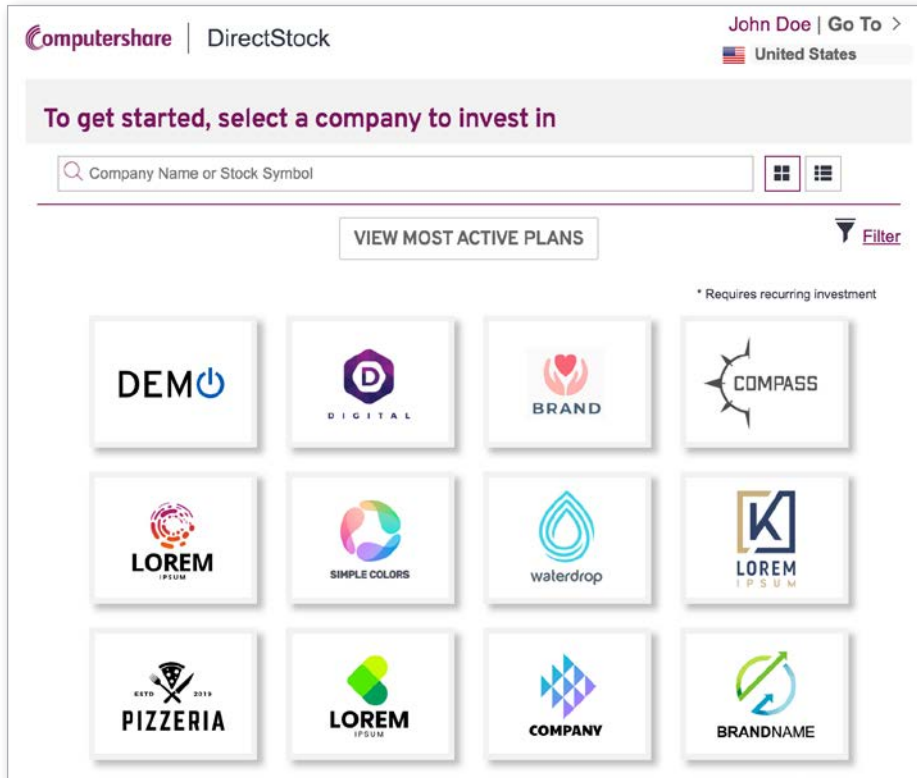
# Investor Center User Guide

## DirectStock

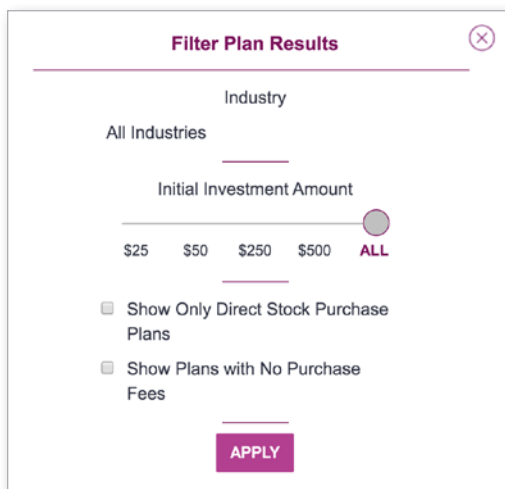
Happy with what you see here, but ready to expand your portfolio and invest in another company?

Click “Buy More Stock” to access the largest selection of direct stock purchase plans in the industry.

You can browse through the list or if you’re interested in a specific company, just type the name in the search bar.



Apply a filter to locate companies: by industry, by initial investment amount, with direct stock purchase plans, or that don't charge purchase fees; or view the list of our most active plans.





Found a company you are interested in? Just click on the company to access the investment plan summary, plan details and documents.

The screenshot displays the 'Review the Company's Plan Details' page for 'DEMO COMPANY'. At the top, the user 'John Doe' is logged in, and the location is set to 'United States'. The company logo 'DEMO' is shown with a power icon, and the ticker symbol 'DEMO' is listed with a price of '\$38.06 As of 2/25/2020 10:36 AM ET'. The plan is identified as 'DEMO COMPANY Direct Stock Purchase Plan'. Navigation tabs include 'DOCUMENTS', 'INVESTMENT OPTIONS', 'PLAN FEES', and 'PLAN FEATURES'. The 'INVESTMENT OPTIONS' section is expanded, showing a table of investment parameters. At the bottom, there are buttons for 'PLAN SUMMARY' and 'INVEST NOW'.

Minimum Investments	
<b>New Shareholders</b>	
One time	\$500
Recurring	\$500
<b>Existing Shareholders</b>	
One time	\$50
Recurring	\$50
Minimum shares required to enroll	1
<b>Maximum Investment</b>	\$120,000 Yearly


Ready to invest? Click “Invest Now” to get started and our investment wizard will guide you through our easy 6 step process.

- > Tell us how much to invest and how often
- > Provide the name, address and contact information
- > Certify your tax identification number
- > Provide direct debit banking information
- > Tell us how you’d like to receive future dividends
- > Review and submit

Computershare | DirectStock John Doe | Logout

Portfolio

**Define Your Investment**



**DEMO COMPANY**  
Direct Stock Purchase Plan

### Investment Details

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\* How often would you like to invest?

Recurring  
 One Time  
 Both

\*How much would you like to invest on a recurring basis?  
 (Minimum \$500.00)

\*Withdrawal schedule:

Monthly on the 15<sup>th</sup>  
 Monthly on the 25<sup>th</sup>  
 Monthly on the 15<sup>th</sup> and 25<sup>th</sup>

Transactions scheduled to post on a weekend or holiday will post on the NEXT business day

CANCELNEXT