



Pictured left to right: Teri, Ron and Tricia

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## OUR MISSION

The Hollander Group is committed to working with you and your family while guiding you through the wealth management process. There is nothing automatic about prosperity.

It requires a strategic vision, a well-thought-out plan, and years of deliberate and steady asset growth. As we work to structure, implement and evolve your personal wealth management plan, our partnership with your tax and legal professionals can prove invaluable.

## ONLINE INSTRUCTIONS

*NOTE: If you have multiple accounts with Hilliard Lyons and they are mailed to you as a 'consolidated' statement, all of your accounts will be available to view online under the **primary account number**. Please contact us to confirm your primary account number before registering your account for the first time. To link multiple accounts together, all accounts are required to have the same mailing address.*

### Step One: It's easy to view your accounts online

- 1.) **Go to [www.hilliard.com](http://www.hilliard.com):** Click on the "Register an Account" link.
- 2.) **Verify Your Identity:** Where indicated, create a username, type in your account number, create a nickname for the account (optional), and type the last four digit of the Social Security Number associated with the account.
- 3.) **Enter Your Email Address:** Input your email address and then confirm it. This email address will be used to send a new password to you if you forget or misplace your current one.
- 4.) **Create Your Password:** Create a password of 8 to 20 characters using at least one letter, one number and one of the following special characters: ! @ # \$ % ^ & \* Next, retype your password in the password confirmation box.
- 5.) **Choose a Security Question:** The security question will be used to verify your identity in the case of a forgotten password. You may create your own question and answer. Please read the helpful tips on creating a strong question/answer.
- 6.) **Done! It's that easy.**

### Step Two: Signing up for E-Notify (Electronic delivery of statements and account information)

- 1.) Sign on to Hilliard.com.
- 2.) Click login with User ID (Primary account number).
- 3.) Select Account Services, click on drop down box.
- 4.) Go to Services, then ENotify.
- 5.) Select Accounts to include for electronic notification.

#### Notes:

- 1.) Enrollment in ENotify will automatically provide you with notifications for the following documents: Statements, Trade Confirmations, Tax Forms, and Shareholder Communications for each account.
- 2.) If you have signed up for E-delivery in the past, make sure those settings are updated in ENotify.
- 3.) To change your password or update settings for ENotify, the client should do the following: Go to Hilliard.com, Account Services, ENotify, My Settings, Alert, Change Email, and Save.
- 4.) Electronic notifications may be received via email, text message, or both and may be sent to other Interested Parties such as your CPA.



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