Before you get started:

• Account passwords need to be changed every 365 days.
• If you have not logged into your account in 180 days, you will need to reset your password (see Forgot Password).
• If you are using Internet Explorer as your browser, we will no longer support older versions — IE 6 through 8.
• Authentication will be required when logging in from an unrecognizable computer.
Mutual Fund Account Access
Under **Account Access**, please select **Mutual Fund Shareholder** or scroll down the page and click **LOGIN** for Mutual Fund Account.

REGISTER
**Step 1 — Secure Sign In Page**

How to
Click **Register** to create a User ID and Password to establish online access.
How to
Enter the last 10 digits of your Mutual Fund Shareholder Account Number, Social Security Number (SSN) or Employer Identification Number (EIN), and 5-digit ZIP code to confirm you are the account holder.

NOTE:
- Select the correct SSN or EIN type by clicking on the appropriate button. Do not use dashes when entering this number.
- Joint Account: Online access is available under the primary Social Security Number (SSN) only.
- Shareholders with a foreign address should use 00000 in the ZIP Code field.

REGISTER
Step 2 — Account Information

REGISTER
Step 3 — Terms and Conditions

Please review all terms and conditions of the Mutual Fund Shareholder Account Access Customer Agreement before proceeding.

How to
Select Accept or Decline after reviewing.

NOTE: You must choose Accept in order to continue.
**REGISTER**

**Step 4 — Personal Information**

**How to**
Enter personal information to establish your online identity.

Click **Submit**.

**NOTE:**
- All fields must be completed with the exception of the **Middle Initial** field.
- **User ID Policy:**
  - Minimum Length: 6
  - Maximum Length: 15
  - Minimum Alpha: 4
  - Minimum Numeric: 2
- **Password Policy:**
  - Minimum Length: 8
  - Maximum Length: 10
  - Minimum Alpha: 4
  - Minimum Numeric: 2
- The following special characters are allowed: +, $, #, @, !, ^, ?, -, _, %, (, ), &, and *
- Before entering your mobile phone number, you must accept the terms of this service. Click the blue “**here**” link to view and accept these terms.

**REGISTER**

**Step 5 — Complete**

You will receive a message that you have successfully registered for the Mutual Fund Online Account Access.
How to
From the Secure Sign In page, enter your User ID and Password and click Sign In to access your account online.

NOTE: If you are using Internet Explorer as your browser, we will no longer support older versions — IE 6 through 8.

First-Time Authentication

Select the email address or mobile phone number on file (if provided) to receive an authentication code.

How to
Click Verify to obtain your Authentication Code.
Authentication Code

How to
Insert the Authentication Code from the email or text. Indicate whether the current device will be used in the future to access your account.

NOTE: The authentication code will be in the body of the text message.

If the authentication code is not received, check your spam or junk mail folder.

Selecting No will require you to go through the authentication process the next time you log in.

Click Continue.

Once authentication is successfully completed, you will be taken to your Portfolio Summary Page.

Signing In

How to
Enter your User ID and Password. Click Sign In to gain access to your online account.
If you have not signed up for eCommunications, you will receive a pop-up reminder.

**How to**

Click *Yes, Not Now* or *Not Interested* to continue.
Forgot Password

How to
Select Forgot/Reset Password.

Enter your User ID.

Click Submit.
A temporary Authentication Code will be sent to the email or mobile phone number associated with the account.

**NOTE:** The authentication code will be in the body of the text message.

If the authentication code is not received, check your spam or junk mail folder.

Enter the Authentication Code sent to verify your account and confirm your identity.

Click **Continue**.

Identity Confirmation is required: Enter the last 10 digits of your Mutual Fund Shareholder Account Number, Social Security Number (SSN) or Employer Identification Number (EIN), and ZIP code to confirm you are the account holder.

Shareholders with a foreign address should use 00000 in the ZIP Code field.

Click **Submit**.
Create a new Password:

Password Policy:
• Minimum Length: 8
• Maximum Length: 10
• Minimum Alpha: 4
• Minimum Numeric: 2

Click Create.

NOTE:
• You will receive an error message if you use a password previously used with your User ID.
• The following special characters are allowed: +, $, @, !, ^, ?, -_, %, (, ), &,
and *.

You will receive a message that you have successfully updated your Password or an indication to wait 20 seconds while we update your record.
How to
Select Forgot your User ID?

Enter the last 10 digits of your Mutual Fund Shareholder Account Number, Social Security Number (SSN) or Employer Identification Number (EIN), and ZIP code to confirm you are the account holder.

Shareholders with a foreign address should use 00000 in the ZIP Code field.

Click Submit.

Your User ID will be displayed on the bottom of the screen. Click Sign In to return to the Secure Sign In page.
When logging in with a new device for the first time you will be asked to authenticate your identity. After entering your User ID and Password, an email or text message containing a 6-digit code will be sent to you. You will be asked to enter the code on bnymellonim.com/us.

For security reasons, some third-party programs like Turbo Tax are not allowed.

For most Web browsers, holding down the Ctrl key on your keyboard and pressing the N key will open a new window to access your email.

Your User ID is not case sensitive. A User ID must contain:
- Between 6 and 15 characters
- A minimum of 4 alpha characters
- A minimum of 2 numeric characters

Your Password is case sensitive. A Password must contain:
- Between 8 and 10 characters
- A minimum of 4 alpha characters
- A minimum of 2 numeric characters

There is no requirement that you use a combination of upper and lower case letters in either your User ID or Password. The following special characters are allowed: +, $, #, @, !, ^, ?, -, _, %, (, ), &, and *.