

Tuesday, March 24, 2020

UPDATE TO PHYSICAL MAIL PROCESSING

Since we started working from home, each office has had one designated employee collect and process mail at least three times per week for U.S. mail, FedEx, and UPS. While we had hoped to continue this process, the changing nature of the coronavirus and the implementation of shelter in place or stay home in many states, requires that we adjust our business processes.

SEND INFORMATION DIGITALLY AND DEPOSITS DIRECTLY TO CUSTODIANS

While we will continue to receive mail, we encourage you to send us information digitally to ensure expedient processing of your paperwork. We also ask that you send any account deposits you have directly to the custodian, Schwab, Fidelity, TD Ameritrade, NATC, or E*Trade, per our standard policy. Click [here](#) to find your custodian's address for your deposit.

ONGOING UPDATES AND KEEPING YOU INFORMED

We will continue to keep you up-to-date on any business continuity changes that may occur. In addition, please bookmark our new [Resource Center](#) that houses all our communications so you can access the most recent information and insights at anytime, anywhere. We are committed to keeping you informed and continuing to provide consistent and timely advice during this challenging time.

For additional questions or concerns about what mail you can send to the office, please reach out to your advisor.



Be well,
Loren Pierson
Chief Operating Officer

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