

New update process for New Account Forms:

Our clients are required to update any changed information (i.e. new address, new phone numbers, etc) on New Account Forms every three years. Historically we have either mailed these New Account Forms to you or had you sign and update them in our meetings.

Our back office Securities Service Network (SSN) has agreed to do the administration of this requirement for our office. We wanted to share this with our clients that you will be receiving confirmation every three years on each of your accounts from SSN. If there are no changes, you are not asked to do anything, but if there are changes to your information, please make the corrections.

If you have any other questions, please give us a call.