



Last week, we shared our ongoing efforts to keep you informed on conversion related matters. Our goal is to make you aware of activities and actions that are significant, in addition to important reminders.

Tuesday, April 9 Conversion Update

Account Opening System (AOS)

- There has been systemic latency with response times with the AOS resulting in longer processing times for new accounts.
- Specific fields required by the AOS system requires manual intervention to complete the application. Accounts established can be verified on WealthStation.
- We are actively working with the AOS vendor to resolve both issues.

New Accounts & Account Maintenance | Processing Delays

- Additional resources have been allocated for the processing of new accounts and maintenance requests.
- New account opening requests are currently being processed within 2-3 business days.
- For account maintenance, we expect to return to standard processing times of 2-3 days within the next 1-2 weeks.

Tax Season | Reminders

- The 2023 Tax Year deadline is next Monday, April 15.
- Prior year contributions must be post-marked by the tax filing deadline of April 15, 2024.
- Tax Payment Requests: To facilitate prompt processing, please ensure that requests to wire funds or send checks to the IRS or States are submitted no later than the end of day on Friday, April 12th.