This Conversion Update provides important information on significant operational matters.

Friday, April 26, Conversion Update

Viewing Statements in WealthStation

- We are aware of an issue which is impacting some advisors' ability to view their clients' statements through the WealthStation Advisor Inbox. This is a technical configuration matter with the single sign on (SSO) from WealthStation to the Document Center. We are working with our technology partner to resolve the issue. We will notify you once it is resolved.
- Your clients' can continue to access their account statements.

Wire Transfers

- Funds deposited via wire transfer are available as soon as the transfer is received. Wire transfers provide a faster option for larger deposits or when funds are needed for time-sensitive investments.

Banking Prenote Process

- To better protect your clients' accounts and mitigate the possibility of future errors, we have implemented a prenote process to validate client instructions for new ACH bank link requests. Once we initiate the ACH link, the bank has to confirm that the account exists. This process to receive verification from the bank typically takes 2-3 business days.
- The funds transfer request received with the bank link set up will be processed by ETCB once the prenote clears.