

DATE: Wednesday, July 17, 2024

FROM: Equity Advisor Solutions

SUBJECT LINE: The Transition to ETC Brokerage Services: WealthStation Training Videos



Dear Valued Advisor,

As we move forward with the transition of your investors' accounts from Equity Trust Company and Axos Clearing LLC ("Axos") to ETCB on July 27, 2024, we want to make sure you have the resources you need as well as answers to some common questions.

When ETC Brokerage Services (ETCB) transitioned to self-clearing, our customer data and transaction processing system transitioned to a new vendor, FIS. Advisors and investors will now view account information through the FIS application called WealthStation.

NEW RESOURCE: [WealthStation Training Videos](#)

On-demand training videos are available to you on topics including:

- WealthStation Account Groups, Trade Solicitation Settings & Account Nicknames
- WealthStation Account Information
- WealthStation Order Entry
- WealthStation Dashboard
- End Investor

Please visit the [ETCB Advisor Conversion website](#) to view the on-demand training videos.

Should you have any questions, please reach out to your Relationship Manager.

Sincerely,
Equity Advisor Solutions

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