

DATE: Wednesday, August 7, 2024

FROM: Equity Advisor Solutions

SUBJECT LINE: Conversion Complete: Accelerayte Guide



Dear Valued Advisor,

On Saturday, July 27, 2024, your investors' accounts were successfully transitioned from Equity Trust Company and Axos Clearing LLC ("Axos") to ETC Brokerage Services (ETCB).

Two timely reminders:

1. **Advisor Guide to Understanding Accelerayte:** A guide to assist advisors with navigating changes from the prior Equity App to the new Accelerayte platform. Accelerayte offers a benefit of allowing advisors to comment directly on a case, helping to streamline communication and improve processing turnaround times. Also new is Innovayte University, a new application including training links and newly added resources to help you manage your business. [View Guide>](#)
2. **Post-Conversion Acceptable Paperwork:** To have a seamless transition with submitting paperwork, ETCB will continue to accept existing applications and documents until close-of-business on August 9, 2024. Please note the paperwork needs to be in-good-order to be processed. For future use, ETCB forms can be found on our website: [View Forms>](#)

As a reminder, we have the below resources to prepare you for this transition.

RESOURCES TO PREPARE YOU FOR THE CONVERSION:

- What to Expect: [Visit Website](#)
- Timeline of Key Dates: [Visit Website](#)
- FAQs: [Visit Website](#)
- Introduction of Accelerayte, your technology platform: [About Accelerayte](#)
- Accelerayte [Training Video](#)
- Visual [Guide](#) to the Accelerayte Dashboard
- WealthStation On Demand Training Videos: [Watch Videos](#)
- View the investor-facing conversion website: [Visit Investor Website](#)
- [Investor Guide: How to Login to WealthStation](#)

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

Sincerely,
Equity Advisor Solutions

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