

<<month date>>

<<first and last name>>

<<address 1>>

<<address 2>>

<<city, state, zip>>

Dear <<first>>,

We're excited to share an important update reflecting our desire to deliver a thoughtful, seamless client experience. Liberty Wealth Services will be transitioning our broker-dealer relationship (the organization that supports trade execution and regulatory oversight) from LPL Financial to **Ameriprise Financial**. This shift underscores our commitment to align with partners whose resources and support mirror the level of quality we strive to deliver.

The transition is scheduled to begin on **Friday, June 12th**, with accounts moving to the Ameriprise platform over the subsequent weekend. Following an intentional nine-month review shaped by client feedback, we're confident this relationship substantially elevates the quality and breadth of resources we provide, resulting in more integrated and modern service touchpoints.

What You Need to Know

- **Your relationship with your advisor does not change.**
- **Your investments do not change.**
- This transition has no taxable consequences.
- Only the broker dealer relationship is changing.
- Closer to the conversion date, we will share instructions for accessing the new Ameriprise website and details about the new mobile app.

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Not Insured by NCUA or Any other Government Agency	Not Credit Union Guaranteed	Not Credit Union Deposits or Obligations	May Lose Value
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What to Expect

- **Regular updates from our team as we approach the transition date.**
- A clear, step by step timeline of the transition process.
- A new technology preview landing page where you can explore Ameriprise tools before the transition.

Why This Change Is Advantageous for You

- **A strong new partnership with Ameriprise. Ameriprise is an industry leading firm with a long history of financial strength and client-centered service.**
- Enhanced client experience. You will benefit from a more intuitive platform, easier navigation, and improved digital tools.
- Greater technology integration. Ameriprise offers an integrated system that streamlines your experience behind the scenes.
- Convenient online tools. Clients will gain access to enhanced scheduling tools, updated mobile app options, and a modernized website experience.

What You Need to Do Now

- **Communicate any recent updates to your contact information** (*email, phone, or mailing address*) with our team. Email us at wealthservices@libertyfcu.org or scan the QR to get started.



- **At this time, no additional action is required from you.**

To stay informed throughout the transition, we encourage you to visit our website for updates:

<https://www.libertyfcu.org/libertywealthservices>

We are grateful for your trust and look forward to continuing to serve you. If you have any questions, please do not hesitate to reach out to our team.

Warm Regards,

Liberty Wealth Services

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