

## Service Team Outline



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Contacting For	Service Team Member
Investment Advice	Scott Sutherland
Market Overview/News	Scott Sutherland
Security Analysis	Scott Sutherland
Investment Objectives	Scott Sutherland
Risk Tolerance	Scott Sutherland
Financial Goals	Scott Sutherland
Changes to Investment Time Horizon	Scott Sutherland
Trading (Equity, Option, Mutual Fund, Other)	Scott Sutherland
Account Review	Scott Sutherland
Envision® Plan Review	Scott Sutherland
General Account Maintenance	Geoffrey Lemoine, Ani Thambi
Contact Information Updates	Geoffrey Lemoine, Ani Thambi
New Account Opening	Geoffrey Lemoine
Trading/Order Entry Support	Geoffrey Lemoine
Document/Form Requests	Geoffrey Lemoine, Ani Thambi
Fee Details	Geoffrey Lemoine, Ani Thambi
Online Access Set Up	Geoffrey Lemoine
Check & Debit Card Orders	Geoffrey Lemoine
Debit & Credit Card Service Issues	Geoffrey Lemoine
Statement Preferences/Statement Linking	Geoffrey Lemoine
<b>Asset Movement Requests:</b>	
Wires	Geoffrey Lemoine, Ani Thambi
ACH's	Geoffrey Lemoine, Ani Thambi
Journals	Geoffrey Lemoine, Ani Thambi
Check Disbursements	Geoffrey Lemoine, Ani Thambi
ACAT Transfers	Geoffrey Lemoine
Free Deliveries	Geoffrey Lemoine
<b>IRA Requests:</b>	
Contributions	Geoffrey Lemoine, Ani Thambi
Distributions	Geoffrey Lemoine, Ani Thambi
Rollovers	Geoffrey Lemoine
Roth IRA Conversions	Geoffrey Lemoine
Consolidations	Geoffrey Lemoine
Custodian Transfers	Geoffrey Lemoine
<b>Report Requests:</b>	
Account Reports, Portfolio Reports	Geoffrey Lemoine
Account and Household Performance	Geoffrey Lemoine
Statements	Geoffrey Lemoine, Ani Thambi
Confirmations	Geoffrey Lemoine, Ani Thambi
Agreements	Geoffrey Lemoine, Ani Thambi
Tax Documents	Geoffrey Lemoine, Ani Thambi
<b>Account Information Inquiries:</b>	
Activity	Geoffrey Lemoine, Ani Thambi
Balances	Geoffrey Lemoine, Ani Thambi
Cash Management	Geoffrey Lemoine, Ani Thambi