

Planning your second quarter 2023 statement messaging



If you would like to include a message to your clients on your Second Quarter 2023 statements, please send your customized message to your Client Service Advocate by Friday, June 30, 2023. If you already have a recurring statement message, that message will continue unless we receive new instructions from you.

Statement messages can be up to 33 lines long, with 74 characters per line and should be formatted with a line between paragraphs (bullet point indentations and special characters are not available). The format for statement messages should not include special fonts, italics, or bold characters.

If you have a statement insert, please notify your Client Service Advocate by Friday, June 30, 2023. Three-page inserts will be accommodated, but more than three pages will delay your statement mailing.

Please contact your Client Service Advocate with any questions.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

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