WHAT'S NEW WITH

AE WEALTH ADVANTAGE

Read more about everything new on the AEWM platform.

BACH TALK

The Power of Meditation: The Single Most Important Life Skill I've Ever Learned

In this episode of Bach Talk, learn how meditation has impacted David Bach's life.

Learn More »

PLATFORM UPDATES

Compliance Update

Review important changes to the AEWM Social Media Policy.

Learn More »

Orion Software Update

Orion is making improvements to its system. Get the details on all the enhancements here.

Learn More »

CUSTODIAN UPDATES

Fidelity

Review the recent change to the Fidelity cash account.

Learn More »

As always, please reach out to your VP of Wealth Management at 866.363.9595 for further details.

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AE WEALTH MANAGEMENT

BACH TALK

The Power of Meditation: The Single Most Important Life Skill I've Ever Learned

In today's episode of **BACH TALK**, I'm going to share my story of how I learned to meditate in less than two hours, the incredible impact it's had on my personal and professional life, and how you can learn to tap into the many benefits of meditation.

LEARN MORE

As always, please reach out to your VP of Wealth Management at 866.363.9595 (tel:866-363-9595) for further detail.

AE WEALTH MANAGEMENT

PLATFORM UPDATES

COMPLIANCE UPDATE

On May 17, 2018, the AEWM Compliance Team updated our Social Media Policy. This is especially important if you use any sort of social media for communication or advertising. Please review these changes to ensure that you are complying with SEC and AEWM rules regarding social media.

CLICKHERE for the update.

As always, please reach out to your VP of Wealth Management at 866.363.9595 (tel:866-363-9595) for further details.

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AE WEALTH MANAGEMENT

PLATFORM UPDATES

ORION SOFTWARE UPDATE

Orion has released the first of its software enhancements for the year. There were extensive updates done to the system.

HIGHLIGHTS

- Enhanced bill pay feature for financial planning and more
- Collecting financial planning fees from custodial accounts
- Securing financial planning fee payments in the Client Portal
- Launching our new Compass tool: Supervise
- Launching iRetire by BlackRock
- Deepened Riskalyze Client Portal integration

For the full release notes on the May 2018 update, please CLICK HERE

As always, please reach out to your VP of Wealth Management
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AE WEALTH MANAGEMENT

CUSTODIAL UPDATES

FIDELITY

FDIC Announcement

As a reminder, we have implemented a change to the default core account for clients' cash at Fidelity. The new default will be the Fidelity Bank Deposit Cash Sweep Program option. The core transaction account is used by Fidelity for processing cash transactions and for holding uninvested cash related to the account. Fidelity will send a letter to your clients on June 13.

- The Bank Deposit Cash Sweep Program will allow your uninvested funds to be protected by FDIC insurance.
- Funds will be transitioned automatically at no cost to the advisor/client.
- This change is completely optional but needs to be completed by Aug. 2.

CLICK HERE to view a sample of the communication.

As always, please reach out to your AE Wealth Support team at 866.363.9595 (tel:866-363-9595) for further details.

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