

THE WEALTH ADVANTAGE



WHAT'S NEW WITH

AE WEALTH ADVANTAGE

Read more about everything new on the AEW platform.



 BACH TALK

Advisor Value Part 1

The Advisor Value, Part 1: In this episode of “Bach Talk,” we’ll talk about how to discuss fees with your clients.

[Learn More »](#)



 PLATFORM UPDATES

AE Wealth Management Updates

Exciting things are happening at AEW. Read about what's new.

[Learn More »](#)

Compliance Update

Review important changes to the AEW approval number process for marketing materials.

[Learn More »](#)

The Copperleaf Process

This series of videos walks you through a time-tested approach to manage your client meetings. Watch Ryan Heath, advisor and co-founder of AE Wealth Management, detail the Copperleaf process.

[Learn More »](#)



 CUSTODIAN UPDATES

Fidelity

Review the recent changes to Fidelity's processes.

[Learn More »](#)

As always, please reach out to your VP of Wealth Management at [866.363.9595](tel:866.363.9595) for further details.

AW0535502 For investment professional use only. The unique experiences and results of the advisors referenced herein may not be representative of all advisors. Results not guaranteed.



AE Wealth Management, LLC, 2950 SW McClure Rd, Topeka, KS 66614

[SafeUnsubscribe™ {recipient's email}](#)

[Update Profile](#) | [About our service provider](#)

Sent by alana.palmer@ae-wm.com in collaboration with

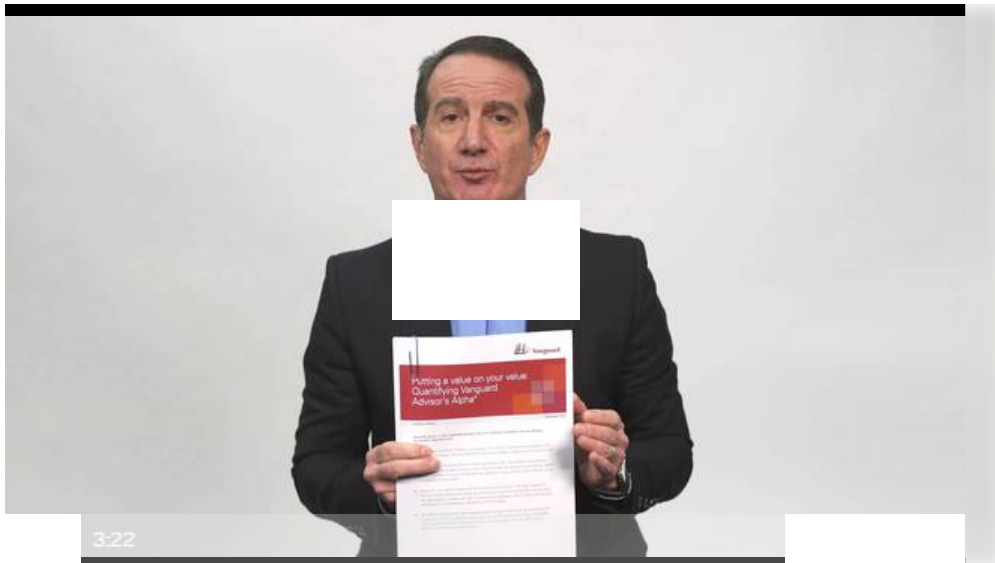


Try it free today



BACH TALK

Advisor Value, Part 1



In today's episode of **BACH TALK**, I'll share with you the biggest and best report I've ever read on this topic, selections from my own writing backed by hard data that you can easily share with your clients, and

how to best make your case. Next up, in Part 2, I'll teach you about the heart-based side of financial planning — and how to keep your clients for life.

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





THE
WEALTH ADVANTAGE



PLATFORM UPDATES

AE WEALTH MANAGEMENT UPDATES

Big News From AEW

Congratulations to our advisor partners. With your help, AE Wealth Management reached \$4 billion in total assets on the platform on June 12, allowing us to be named one of the biggest RIA gainers of 2018 by Investment News. Thank you for your continued trust in us!

Read the press release **HERE**

Read the article **HERE**

Going Social

AE Wealth Management has launched multiple social media platforms. You can now find us on Twitter, LinkedIn and our very own WealthSpeaks blog. Stay up to date with investment news by following AE Wealth Management.

Twitter / LinkedIn / WealthSpeaks

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

AW535502 - For investment professional use only.





PLATFORM UPDATES

COMPLIANCE UPDATE

Going forward, any marketing materials reviewed by Compliance will no longer be assigned an AW#. All new submissions will instead receive a six-digit approval number. This does not affect previously approved materials or updates made to previously approved materials.

If you have any questions, please email adreview@ae-wm.com or call 866.363.9595 and request to speak to a Compliance Consultant.

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

AW535502 - For investment professional use only.



PLATFORM UPDATES

THE COPPERLEAF SALES PROCESS

As you may know, our partners at Copperleaf Capital have documented their easy-to-implement sales process in a series of videos. Ryan Heath will walk you through their 1st, 2nd and 3rd client appointments, and show you how to use these skills with your own clients. These videos are now available to you on the AE Wealth Management website.

View them **HERE**.

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

AW535502 - For investment professional use only.



THE WEALTH ADVANTAGE



CUSTODIAL UPDATES

FIDELITY

Money Movement Enhancements

Fidelity has updated its policy regarding creating first-party standing instructions. They have also updated their Standing Payment Instructions Form to incorporate the changes. Important changes to note include:

- To set up EFT instructions, a voided check, statement or deposit slip with all account owners' names will be required.
- Any third-party standing instructions will require an attestation signature from AEW.
- The previous version of the form will be accepted until Aug. 2.

View the correspondence with full details **HERE**.

View the new form **HERE**.

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 sent 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.

AW04180102 - For investment professional use only.