WHAT'S NEW WITH

AE WEALTH ADVANTAGE

Read more about everything new on the AEWM platform.

BACH TALK

Advisor Value Part 2

This is Part 2 in my series about how to talk to your clients about fees.

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PLATFORM UPDATES

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Fidelity Update

Review the recent changes to Fidelity's processes.

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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

Advisor Value, Part 2

In today's episode of BACH TALK, I'll share the three types of people who come to you looking for advice — and why one kind of person will almost never become a client, no matter what you do. Then, I'll talk about common myths around fee structures, how you should talk to all your prospective clients to build trust and how elevating the conversation can eliminate client objections based on fees altogether.

Learn More »

Media Announcements

See what's happening with AEWM in the media

It's a great honor to be named the 2nd Fastest Growing RIA. We could not have accomplished this without you, our advisor partners. Read the announcement **HERE**.

AEWM Advisors are using creative prospecting to help grow their businesses. Read more **HERE**.

More from this month's Wealth Advantage:

Fidelity Update

Advisor Value Part 2

CUSTODIAN UPDATES

Fidelity Update

Effective Aug. 1, 2018, Fidelity will NIGO any cashiering items with missing customer initials and dates on EFT and WIRE Forms. Please be sure each page is initialed at the bottom of the form. AEWM will continue to notify your office if these initials and/or dates are missing.

More from this month's Wealth Advantage:

Media Announcements

Advisor Value Part 2

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