

THE WEALTH ADVANTAGE



WHAT'S NEW WITH

AE WEALTH ADVANTAGE

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 BACH TALK

How Versus Who -- Thinking in Terms of Talent, Not Tasks

In this episode of BACH TALK, we'll discuss how you can achieve more than you ever thought possible!

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 CUSTODIAN UPDATES

Fidelity Update

Review important updates from Fidelity.

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Details on RMD notices from Fidelity

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BACH TALK



How Versus Who — Thinking in Terms of Talent, Not Tasks

In today's episode of **BACH TALK**, I discuss how changing from “*How do I get things done?*” to “*Who's going to get it done?*” in your business can help you achieve more than you ever thought possible!

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CUSTODIAN UPDATES

Fidelity Update

On July 11, AE Wealth Management updated the Asset Movement Authority (AMA) levels on all client accounts from Level 2 to Level 1 (first and third party).

This was completed after Fidelity reviewed each AMA level and deemed that AMA Level 2 constituted custody of client funds.

This new level of AMA will still allow for first-party checks to the client's address of record without standing instructions being completed. In addition, if a standing payment instructions form is completed, the below transactions can still occur without gathering a client signature for each transaction.

- First-party EFT or bank wires
- Third-party EFT or bank wires
 - Third-party checks
 - Third-party journals

For full details, read Fidelity's Asset Movement Authorization document [HERE](#).



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CUSTODIAL UPDATES

NOTICE FROM FIDELITY

Fidelity will send out letters regarding RMDs the week of Sept. 17, 2018.

Review the notice and a sample letter [HERE](#).

As always, please reach out to your AE Wealth Support team
at 866.363.9595 for further details.

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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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