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Sent:
To: CLIENT EMAIL ADDRESS
Subject: Greenbush Financial Group Fidelity DocuSign – Immediate Action Required

DocuSign



Greenbush Financial sent you a document to review and sign.

REVIEW DOCUMENTS

CLIENT NAME:

As we discussed, we are moving all of our clients from American Portfolios to Fidelity as of April 18th. Attached are the DocuSign Fidelity forms that you will need to electronically sign to set up your accounts at Fidelity and begin the in-kind transfer process. Please complete the documents where prompted by the yellow tab. Once complete, a yellow "Finish" button will appear.

We are strongly encouraging all of our clients to complete the DocuSign process as soon as possible. After April 18th, we will not be able to see or manage your investment accounts until they have successfully transitioned to Fidelity. We will send you a confirmation email once the transfer process is complete and provide you with instructions on how to set up your online access to the Fidelity platform.

Please let us know if you have any questions or need assistance with completing this packet.

Michael Ruger & Rob Mangold
Greenbush Financial Group
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