

## FSI Membership Renewal

My Compliance Office Task Deadline: Oct 31st

As you know, the Financial Services Institute (FSI) is the only organization advocating solely on behalf of independent financial advisors and independent financial services firms. FSI represents your interests in Washington, D.C., striving to create a healthier regulatory environment through constructive engagement with the U.S. Congress, and with regulators like FINRA, the SEC and the Department of Labor.

While the primary benefit of FSI membership is strong and effective advocacy, membership also provides you eligibility to participate in the FSI CoveredAdvisor Benefits Program (code FS4Kovack), which includes access to:

- Advisor Disability: Up to \$35,000 in monthly benefit
- Advisor & Spouse Group Term Life/AD&D: Up to \$2 million (\$1M life + \$1M AD&D), term to age 75
- Medical/Dental/Vision, 401(k), HR & Payroll Support through a bundled CPEO business solution
- Staff of Advisors: Long & Short-Term Disability plus Term Life/AD&D
- Critical Illness, Accident, Business Overhead Insurance

On Tuesday September 3rd you received an email notifying you that you have been assigned a new My Compliance Office task. It is simply a "yes" or "no" question asking if you would like to be a 2025 member of FSI. If you select "yes", we will facilitate the renewal of your FSI membership by deducting your annual FSI membership fee of \$199 during your annual renewals in December. If you would like to "opt-out" of FSI, please select "no".

A reminder that the My Compliance Task must be completed no later than October 31, 2024. (Requests to "opt-out" via email or phone will not be accepted.)

If you have any questions regarding FSI, please email Mindy Marble at [mmarble@kfn.com](mailto:mmarble@kfn.com).

Thank you for your support of FSI.