



# Journey to One Infinex Programs

## Client Talking Points

- Infinex Investments, Inc., the firm I use to support my business operations, has been rebranded to Osaic Institutions, Inc.
- The firm's parent company has also adopted the Osaic brand (formerly Advisor Group).
- You may notice the new name and logo on materials from Osaic Institutions, but otherwise, you will not experience any changes.
- Systems and forms are being updated to reflect this new name, but you may continue to see the Infinex name until that is completed.
- This change will not impact the way we work together, and I'll continue to manage your accounts in the same way as today.
- Your account numbers and logins will also remain the same as today.
- If they haven't already, Osaic Institutions will notify you of this change and provide an updated annual privacy policy.
- If you are enrolled in e-delivery, these notifications will be sent electronically via an email from Infinex. Otherwise, it will be sent via U.S. mail.
- No action is required from you because of any of the information Osaic Institutions sends you about the name change.
- Your household may receive multiple notifications, depending on which Social Security Numbers are associated with your account.