

Dear [client],

I'm reaching out to share some exciting news regarding Infinex Investments, Inc., the firm I use to support my business operations.

On September 12, Infinex announced that it will be rebranded to Osaic Institutions, Inc., starting October 23, 2023. The firm's parent company (formerly Advisor Group) has also adopted the new brand and name. Osaic Institutions will soon provide you with official notice of this change, along with an updated annual privacy policy. **This notice requires no action from you.**

This rebranding will not impact the way we work together or your relationship with [investment program name], or [bank/credit union name]. I'll continue to manage your accounts in the same way I do today. You may notice the appearance of 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 or Advisor Group name until that is completed.

If you have any questions, please don't hesitate to contact me. As always, I am also available to discuss any substantial life or financial changes. Thank you for your time and the ongoing opportunity to serve you.

Sincerely,

[financial professional name & signature/contact information]

[Please include your current program-approved email signature when emailing this communication and your approved program stationary when sending through physical mail.]