

# Quarterly Statement Customization

## Schedule and Deadlines

This schedule outlines the deadlines for notifying your Client Service Advocate about statement insert requests, custom messaging, and logo customization submissions.

### Important Guidelines

#### Statement Inserts

- Cannot exceed three pages
- Non-regulatory communications only

#### Statement Messages

- Up to 33 lines long, with a maximum of 74 characters per line
- Messages should include a line between paragraphs
- Bullet points, special characters, and indentations are not supported
- Special fonts, italics, or bold text is not supported
- If you have an existing recurring statement message, it will continue unless we receive updated instructions

### Customization Deadlines

Statement Period End	Custom Logo	Custom Messaging	Inserts
<b>Quarterly Statements</b>	<b>15<sup>th</sup> of Month*</b>	<b>15<sup>th</sup> of Month*</b>	<b>Last Day of Month*</b>
3rd Quarter 2024: September 30	9/13/24	9/13/24	9/30/24
4th Quarter 2024: December 31	12/13/24	12/13/24	12/31/24
1st Quarter 2025: March 31	3/14/25	3/14/25	3/31/25
2nd Quarter 2025: June 30	6/13/25	6/13/25	6/30/25
3rd Quarter 2025: September 30	9/15/25	9/15/25	9/30/25
4th Quarter 2025: December 31	12/15/25	12/15/25	12/31/25

*\*Deadlines that fall on non-business days will be adjusted to the previous business day.*

**Questions?** Please reach out to your Client Service Advocate.

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**Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.**

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