

Quarterly Statements

Q4 Deadlines

To help ensure your statement customizations are applied please keep the following deadlines and guidelines in mind for quarterly statements. Our partnership with Mediant, a BetaNXT company, has allowed us to offer full-color statements, superior print quality and consistency, advanced address verification, and faster delivery times

Important Deadlines

Logo changes must be submitted by the 15th of the prior month.

- **For Q4 statements, the submission deadline is December 13.**

Advisor inserts and custom messaging must be submitted by the last day of the prior month.

- **For Q4 statements, the submission deadline is December 31.**

Please work with your Client Service Advocate for statement customization and submissions. You can find the Quarterly Statement Customization Schedule in the Quick Links section.

Important Guidelines

Statement Inserts

- Cannot exceed three pages
- Non-regulatory communications only
- Requires one-inch margin border on all borders

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, and bold text are not supported
- If you have an existing recurring statement message, it will continue unless we receive updated instructions

Questions? Please reach out to your Client Service Advocate.

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

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