From:	Casey Ryder
To:	Casey Ryder
Subject:	Schwab Integration Timeline | Submitting Requests | Fusion Access Through 9/5
Date:	Monday, August 28, 2023 1:00:52 PM
Attachments:	image001.png

Hello everyone,

First and foremost, thank you to everyone who attended the event last week. It was great to see everyone in person and we're excited about the success of the event. It was encouraging to see so many advisors engaged in the material and we're glad that everyone had fun in Vegas. We're already looking forward to our next event in 2024.

Regarding Fusion online access ahead of the integration this weekend, please note that access to Fusion for all users (including our staff) will be turned off entirely starting this Thursday the 31st at around 12PM MST and through the weekend. Please don't be alarmed if you can't get logged in as this is normal and related to the Schwab integration. Access may come back on and off throughout Friday and the weekend, but we are not sure yet what to expect, so please do not expect to submit tickets or see ticket updates from our office during this time.

Please see the reminders below about a few cut-off dates below related to the integration:

~~8/18: Last day to submit new accounts at TD~~ *(already passed)*
~~8/25: last day to request account transfers in and out of TD, or any service requests at TD requiring submitted paperwork~~ *(already passed)*
8/30 @ 12PM MST: last day to submit trade or money movement request tickets in Fusion
8/31: last day for Advisor TD VeoOne access (please be sure to set up your Schwab access if you haven't already – see past emails or VeoOne prompts for instructions)
8/31 @ 12PM MST: all Fusion online access on hold through the long weekend (this includes WWA staff)
9/1: Trading "blackout" day, no trading accounts on this day
9/4: Market holiday – WWA office and markets closed
9/5: Trading "blackout" day, no trading accounts on this day
9/6: Trading back "on". Advisors can use the Fusion tools as usual to create paperwork and submit requests at Schwab. See the Operations > Charles Schwab integration page of our website for tips on opening accounts at Schwab compared to TD.

Extra reminder that billing may be delayed in September, but we will keep in touch on the timeline once we know more. Also, Structured Note requests for September will be processed on a best-efforts basis. Notes closing at the end of the month will be most likely to process rather than notes closing earlier in the month.

We'll be in touch as we receive more updates. Please let us know if you have any questions.

Thank you,

Casey Ryder
Operations Director
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