From:	Casey Ryder
To:	Casey Ryder
Subject:	Schwab Integration Update | Tuesday Afternoon 9/5
Date:	Tuesday, September 5, 2023 5:36:01 PM
Attachments:	image001.png

Hello everyone,

Please note that I'm still working on making sure that the data feed and visibility for all our Advisors is set-up correctly between Schwab and Fusion after the integration this weekend. I did find some items that need fixing, so if you can't see your account list yet in Schwab or in Fusion, that is normal, and I'm in the process of correcting that with Schwab and Fusion. I'll be in touch in the morning with another update and hopefully we will be ready to go live with Schwab and Fusion tomorrow. Right now we are still on pause for a moment.

If you had not yet finished setting up your Schwab log-in credentials, please do so right away by following the prompts when logging into VeoOne and being re-directed to the Schwab site.

If you need assistance and are stuck in the online registration process, I will reply to you as soon as I fix some of these larger issues first so that everyone can move forward.

I appreciate your patience.

Thank you,

Casey Ryder
Operations Director
(855) 822-3708

WEALTHWATCH ADVISORS

From: Casey Ryder
Sent: Tuesday, September 5, 2023 9:01 AM
To: Casey Ryder <casey.ryder@wealthwatchadvisors.com>
Subject: Schwab Integration Update | Tuesday 9/5

Good morning,

Copied below is an updated outline of our Schwab integration timeline. Please note that the TD integration with Schwab was successful over the weekend as planned. You can no longer see your account list inside TD's VeoOne today, and that for the moment, Fusion is still inaccessible while they make updates to their system. There are still a number of items to work through on our end today now that the integration has officially happened so that Advisor visibility and date feeds are working correctly. Please stay tuned for another update while we work on things in the background today. We anticipate that the database will be ready to use as usual by the end of the day today. We will be in touch again by the end of the day today with the next update.

~~8/18: Last day to submit new accounts at TD~~ *(passed)*
~~8/25: last day to request account transfers in and out of TD, or any service requests at TD requiring submitted paperwork~~ *(passed)*
~~8/30 @ 12PM MST: last day to submit trade or money movement request tickets in Fusion~~ *(passed)*
~~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)~~ *(passed)*
~~8/31 @ 12PM MST: all Fusion online access on hold through the long weekend (this includes WWA staff)~~ *(passed)*
~~9/1: Trading "blackout" day, no trading accounts on this day~~ *(passed)*
~~9/4: Market holiday – WWA office and markets closed~~ *(passed)*
9/5: Trading "blackout" day, no trading accounts on this day. ***access to Fusion will be limited throughout the day as they update their system**** *(underway)*
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.

Thank you for your patience,\

Casey Ryder
Operations Director
(855) 822-3708

WEALTHWATCH ADVISORS

From: Casey Ryder
Sent: Friday, September 1, 2023 1:41 PM
To: Casey Ryder <casey.ryder@wealthwatchadvisors.com>
Subject: Schwab Integration Timeline | Submitting Requests | Fusion Access Through 9/5

Hello and Happy Friday,

As a reminder to our 8/28 announcement below, please note that Fusion access is off today through next Tuesday, and trading is "blacked out" through 9/5. This weekend is the official conversion to Schwab, so your clients may momentarily lose online visibility over the weekend. This is normal and the goal is that all accounts pop up on the Schwab side by Tuesday morning the 5th. We will be in touch on Tuesday with updates and instructions on to proceed with Schwab once we make sure that the integration was completed successfully.

Please see the updated date expectations below:

~~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~~ *(already passed)*
~~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)~~ *(underway)*
~~8/31 @ 12PM MST: all Fusion online access on hold through the long weekend (this includes WWA staff)~~ *(underway)*
9/1: Trading "blackout" day, no trading accounts on this day *(underway)*
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. ***we will be in touch with Advisors on Tuesday so confirm that Schwab is ready to use***

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 on Tuesday with more information. We hope everyone enjoys the long weekend.

Thank you,

Casey Ryder
Operations Director
(855) 822-3708

WEALTHWATCH ADVISORS

From: Casey Ryder
Sent: Monday, August 28, 2023 1:01 PM
To: Casey Ryder <casey.ryder@wealthwatchadvisors.com>
Subject: Schwab Integration Timeline | Submitting Requests | Fusion Access Through 9/5

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)
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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
(855) 822-3708

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