

Name 1
Name 2
Address 1
Address 2
City, State, Zip

Dear Valued Client:

I am writing to give you more information about an important change will take place at Crews & Associates, Inc. (“Crews”) in 2021, making it a year of transformation with numerous benefits for you.

At Crews, our mission is to provide financial solutions for you, your family, and your business. As part of this commitment, we are pleased to announce our expanded partnership with Pershing LLC (“Pershing”), a subsidiary of the Bank of New York Mellon Corporation. Crews has cleared its equity business through Pershing for over 30 years, and we look forward to enhancing this relationship with the addition of our fixed income activity. For over 80 years, Pershing has been recognized as a global investment firm and industry leader in clearing and custody services with \$2.0 trillion in assets representing 7 million global investor accounts.

Crews’ expanded partnership with Pershing will improve our ability to collaborate more closely with you on your financial journey and give you access to financial planning tools that will improve your overall investing experience.

Here are just a few of the benefits you will soon enjoy:

- Robust, user-friendly client portal
- Ability to consolidate account information
- Online access from any device, including mobile access
- Electronic statements, confirmations, and tax documents
- Electronic document and signature exchange
- Upgraded operations and technology platforms

As part of this transition to Pershing, you will receive additional notifications over the next few weeks. We hope you will be as excited as we are to introduce these valuable enhancements. Crews appreciates the confidence you place in us to provide knowledgeable assistance to you and your family. If you have any questions or concerns, please contact your account executive or call the Crews Pershing Transition Team at 501-534-2350, or email us at pershingtransition@crewsfs.com.

Sincerely,



Dennis Clay
CEO

Crews & Associates, Inc.

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