

WHAT TO EXPECT GOING FORWARD

WHEN WILL I RECEIVE STATEMENTS?

- ◆ Monthly statements
- ◆ How can I access my accounts online?
 - ❖ Contact Laura Benvenuto at lbenvenuto@hudsonfs.com to set up web and mobile access

WHEN WILL WE MEET NEXT?

- ◆ Based on your preferred meeting frequency
- ◆ Must meet at least annually
- ◆ How can you schedule a meeting?
 - ❖ Contact Denise Lentini at 914-762-4760 or dlentini@hudsonfs.com
 - ❖ Use our online calendar scheduling app to schedule a meeting with Kathryn Palao or Joseph Passaniti: <https://go.oncehub.com/hudsonfs>

WHO DO I CONTACT FOR SERVICE RELATED QUESTIONS OR ISSUES?

Laura Benvenuto (914) 762-4760, ext.11 lbenvenuto@hudsonfs.com

- ◆ Beneficiary changes
- ◆ Withdrawal requests
- ◆ Contact information changes
- ◆ Online access assistance

HOW CAN I CONNECT WITH HUDSON FINANCIAL SERVICES ON SOCIAL MEDIA?



Scan this QR code using your phone camera to access our social media pages and website links

Please do not hesitate to contact us if you have questions, or if anything in your life has changed that we need to be aware of. From time to time, you will receive a phone call or email from one of our team members to request a meeting or call to review your investments and your financial plan with us. We ask that you respond to those requests in a timely manner. Feel free to pass along our contact information to anyone you feel would benefit from our services.