

## WHAT TO EXPECT NEXT

### WELCOME ABOARD!

Your new account paperwork is complete and our relationship is now official! We are excited and extremely grateful for the opportunity to guide you through your financial journey. Here's what's next:

### NEW ACCOUNTS, TRANSFERS AND ACCESS

- ❖ We will help ensure your new account(s) are opened accurately, and once they are funded, our team will send you an email confirmation. Going forward, you will receive statements on a monthly basis.
- ❖ Our Client Service Specialists, Laura Benvenuto and Justin Moritz, are here to walk you through the process to setup your client portal login, and how to view statements, documents and returns, securely and easily.

### WE ARE ALWAYS HERE FOR YOU

- ❖ From the moment you become a client, we'll communicate with you throughout the year -- whether it's a helpful update, an opportunity to review your plan, or a check-in when things change.
- ❖ Don't hesitate to call or email us with any questions or concerns. Whether you're unsure about a document or have a big life decision coming up, we want to hear from you.

### YOUR PERSONAL REVIEW MEETINGS

- ❖ We will reach out to schedule your first formal review meeting around 90-days after your plan and accounts are fully in place. This is a great time to revisit your goals, ask questions, and review your strategy. Following your meeting, you'll receive a summary outlining what we discussed and any next steps we'll take together.
- ❖ Future meetings will occur at least annually, but we can accommodate your preferred frequency.

### REACH US ANYTIME

- ❖ For account servicing related requests (address or beneficiary changes, contributions/withdrawals, online access) – Laura Benvenuto at [lbenvenuto@hudsonfs.com](mailto:lbenvenuto@hudsonfs.com) or Justin Moritz at [jmoritz@hudsonfs.com](mailto:jmoritz@hudsonfs.com)
- ❖ For scheduling a meeting, call or email Denise Lentini, Administrative Assistant – [dlentini@hudsonfs.com](mailto:dlentini@hudsonfs.com) or book directly through our scheduling app [HERE](#).
- ❖ Connect with us on social media – scan our QR code or click [HERE](#) to access our content and website links.



## WELCOME TO HUDSON FINANCIAL SERVICES!

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