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From The Desk Of The CEO:



To all our Representatives, Partners, and support professionals, we want to thank you for your feedback, positive comments and support during this very unusual time. Many of you have been in contact with PCS staff either for business purposes, or just to check in on us and we appreciate the sense of community and professionalism that has been shown over the last several weeks.

I wanted to share some information with you regarding the steps PCS has taken to ensure we continue to be available to support each of you and your business:

Business Continuity - Private Client Services (PCS), has an extensive disaster preparedness plan which we have routinely tested over the years and have confidence in. One important aspect of the plan was for our firm to purchase and deploy technology which enables employees to work effectively from remote locations such as their homes. This investment in planning, redundant locations, third-party technology vendors and portable devices is a significant benefit to our employees, advisors and their customers.

Open for Business - PCS plans to maintain normal business hours even if every employee is working from home. The chilling news reports of massive layoffs resulting in high unemployment are concerning as is the prediction of illness and deaths from the virus. PCS is not immune from the effects of such events, including the significant downturn in the stock market. Fortunately, PCS has a strong balance sheet, has no debt, and has capital far in excess of our clearing and custody agreements and that of the regulatory requirements.

PCS White Glove – Concierge Treatment - PCS employees are some of the best and brightest in the financial services industry and they are readily available to help you and your firm. PCS has made no plans to decrease staff, reduce hours or change service standards. We will be here when you need us the most.

Protection of Advisors - As this pandemic spreads, the processing of new business and honoring requests for money transfers, etc. will be crucially important. PCS will be paying extra close attention to everything, especially money movement requests. PCS will assist our advisors to protect everyone from fraudsters. We will be applying extra scrutiny to our normal procedures for checking signatures and the basis of the request, and will analyze and verify information as needed with you.

Looking Ahead - While no one knows the duration of the challenges we face from this, our first pandemic, PCS will weather this storm, as will you and your families. We have an opportunity to deliver to our stakeholders everything expected of us. We are truly capable of making anyone's experiences with us a great one. We are in a really good spot to deliver what we promise.

Please continue to comply with the guidance related to social distancing, utilize the wonderful technology available to us today related to video conferencing with your clients, and let us know if there is anything we can do to assist with the success of your business.

Ernest Sampson, ChFC, CLU, AEP, CFP™

Direct (502) 992-3540

Email: esampson@pcsb.net

ADMINISTRATIVE UPDATE:

Money Fund Liquidity and Your Clients

As registered representatives, we all are aware that clients often think of money market funds as cash, a safe place to park their money that isn't invested somewhere else. And, in typical circumstances, investing your client in a money-market fund is a low-risk, albeit, low-return investment pool of solid, liquid, short-term debt instruments.

Given the current volatility of the market, the Federal Reserve is establishing the Money Market Mutual Fund Liquidity Facility to allow money market mutual funds to sell off municipal bond holdings to satisfy redemptions in an attempt to maintain market liquidity. However, experts indicate the step may not be enough to keep the funds from breaking a buck.

As money market mutual funds are not FDIC-insured, it's a great time to take a look at your clients' cash positions to ensure they are appropriately situated for potentially looming liquidity issues. Pershing has multiple FDIC insured options for sweep accounts connected to brokerage accounts that may be a good option in the current environment.

Visit Pershing's NetX360 RateBoard (under the Markets & Research tab) for easily accessible information on available money funds and yields.

2020 ADV Part 2b Supplement Brochures (PCS IARs)

All ADV2b supplement brochures have been finalized into a new format for 2020 and were delivered to all PCS investment advisory reps by email. If you need another PDF of your ADV2b supplement, please contact Mary Wescott.



Mary Wescott,
Chief Administration Officer

TRAINING AND ELECTRONIC MEDIA UPDATE:

PCS Firm Training - Regulation Best Interest

On March 2nd a new training course was added to all associated persons training portal (Quest CE) related to the upcoming new regulation Best Interest. The course is designed to provide everyone with an overview of the new regulation and outline some of the changes that all representatives, investment advisory representatives, RIAs and broker dealers will need to make in order to be in compliance with the new regulations.

The due date for completion of the training was set at April 30, 2020. PCS recognizes that there have been many disruptions to our business over the last month and wants to provide everyone the opportunity to complete the training in a timely manner. Therefore we have extended the completion date to May 30, 2020. Please use this extra time to take care of your clients and business.

If you have any questions or need help accessing the portal, please do not hesitate to reach out to your Managing Principal, OSJ Manager, or to me directly at jluse@pcsbd.net.



Jeremy Luse
Compliance Surveillance Officer

OPERATIONS UPDATE:

Tax Season Overview

The Treasury Department and Internal Revenue Service announced on March 21, 2020 that the federal income tax filing due date is automatically extended from April 15, 2020 to July 15, 2020. To help you and your clients navigate the tax season, PCS would like to share the various tools and communications Pershing provides. The following tables provide a broad overview of the resources available.



Lorna Hill, Director Training
& Strategic Operations

Advisor Tools

Resource	Details	Find It
Mailing Schedules	<p>Pershing utilizes a four-phase mailing approach for IRS Form 1099 (B, DIV, INT, OID and MISC) tax statements.</p> <p>Tax documents are posted in e-Document Suite and IFA via NetX360. This includes Draft 1099s, Initial 1099s, Pending 1099 Notices and Revision Mailings. Note that Draft forms are not available to investors. They are not mailed or delivered electronically, and they are not viewable in NetXInvestor.</p> <p>Courtesy 1099s will be posited to e-Document Suite during phases three and four of the 1099 mailing. Courtesy 1099s are available to foreign accounts, and S and C corporations (excluding IRA and qualified plans). Note: The Courtesy 1099 statement is being provided for informational purposes only and will not be furnished to the IRS.</p>	<p>Dates are provided each year and can be found within Resources of NetX360</p> <p>Posted to e-Document Suite; if enrolled in e-delivery, investors will receive notification that a Courtesy 1099 is available. Courtesy 1099 statements will not be delivered by mail.</p>
Tax Reporting	Provides the latest tax information and resources in one convenient location, including links to communications, tax materials, training information, webcasts and more.	NetX360 > Marketing Center > Education Centers > Tax Reporting
eAnalytics 1099 Download to Excel	1099 Download to Microsoft Excel – Provides for download of three rolling tax years of 1099 data to Excel for reportable 1099 information by tax year (for 1099-B, DIV, INT, OID and MISC). This will allow users to view and filter aggregated 1099 data in various ways, including Office, IP, TIN, CUSIP and Household.	NetX360 > Reports and Documents > Report Center > All Reports > Keyword (s): Tax Reports
Sample Tax and Year-end Statement (TYES)	The TYES is an enhanced version of Pershing's standard Tax Information Statement, which contains a detailed summary of reportable and non-reportable transactions to assist with tax preparation for brokerage accounts. This enhanced statement includes both covered and non-covered transaction details from realized gains and losses.	<p>Sample in Education Centers > Tax Reporting Tools and Resources in Marketing Center</p> <p>Can be viewed in e-Document Suite</p>

Revision Process	<p>The first revision mailing for Form 1099 was mid-February. This batch of revisions reported changes to any tax statements mailed as part of Phase One.</p> <p>Revisions then occurred at the end of February and mid-March to report corrections to tax statements mailed in any of the previous mailings. After mid-March, revisions will be sent weekly.</p> <p>NOTE: If an income correction is made to a client account after issuing his or her tax statement and the correction is an increase or decrease of less than \$100 of income, Pershing may not send a revised tax statement. If the client would like to receive revisions that are less than \$100, contact PCS Operations.</p>	Drafts of revised tax statements can be viewed within e-Document Suite by the Tuesday prior to their mailing.
Tax Guide	The Tax Guide has important information for you and your clients. It explains how to read various tax statements and provides pertinent tax reporting instructions and requirements to help clients prepare their tax returns.	NetX360 > Marketing Center > Education Centers > Tax Reporting

Investor Information

Resource	Details	Find It
Mytax-handbook.com	Important tax information is available for your clients, including the Tax Guide, a sample Tax and Year-end Statement, royalty trust information and a supplemental information tool.	Mytaxhandbook.com
Pending 1099 Notice	This notice is used when Pershing has not received all information from issuers or they have not completed processing/review of all information to complete 2019 1099 reporting for a client's account prior to the cutoff for the mid-February mailing. Once the remaining information was received and processed, Pershing mailed the client's form.	Pending 1099 Notices can be viewed on eligible client statements within e-Document Suite
Statement Messages	A statement message was included in investors' November and December statements (for accounts eligible to receive a consolidated 1099) informing them of the 1099 tax statement mail dates. A separate message was included in January (for eligible accounts).	Statement messages can be viewed on eligible client statements within e-Document Suite

Mailing Schedules

Form 1099s have been mailed to clients, and Pershing is scheduled to send 2019 IRS Forms 5498 and 5498-ESA to your clients by May 31, 2020.

Pershing will send clients the forms if Pershing was the custodian or servicing agent of the IRAs and/or ESAs in 2019, and the accounts were credited with 2019 contributions.

Should you have any questions, please contact Operations at 502-992-1640 or operations@pcsbd.net.

Order Types - Pershing Brokerage Accounts

During times of market volatility, it is often prudent to use various order types to buy and sell equities and ETFs. Protecting client gains and preventing losses can be achieved by entering stop, limit and stop limit orders, but these order types are not without risk and it is important to know the differences to achieve the desired outcome. Here is a review of order types and how they work.



Ryan Armock,
Chief Operations Officer

Limit orders are entered to buy or sell at a particular price or better. Often a target price is chosen to buy or sell a security, and a limit order can be entered to execute that order at the target price or better. For example, security XYZ is trading at \$11.00 and you or your client want to purchase the security if it trades at \$10.00 or lower. You will enter a buy limit order at \$10.00. When XYZ trades at or through \$10.00, the trade will execute. On the sell side, if XYZ is trading at \$11.00 and you or your client wants to sell if it trades at \$12.50 or higher, you will enter a sell limit at \$12.50. For buys, limits are generally entered at or below the current market price, and for sells they are entered at or above the current market price. It is important to note that your client's limit order may not be the only limit order at that price, so if a security trades briefly at the limit price, the order may not execute. Several factors including time of entry, size of the order and where the order was routed for execution may determine if and when your order is executed. Finally, remember that buy limit orders are reduced by an amount equivalent to any dividends declared on the ex-date, unless 'do not reduce' is selected in the 'additional order info' box in NetX360.

Stop orders are entered to become a market order when a certain price is hit. Typically, stop orders are used to protect gains and prevent losses on long securities. For example, a client is long 100 shares of XYZ that they purchased at \$5.00. Currently, XYZ is trading at \$12.00. The client wants to protect their gain, so a sell stop order is entered at \$10.00. If the stock price drops to \$10.00, it will turn into a market order and execute at the next market price. It may execute at, above or below \$10.00 depending upon the next trade. On the sell side, stop orders are typically entered below the current market price. Stop orders can also be used on buys to protect a short position or purchase a stock that may be on an upward trend. On the buy side, stop orders are entered above the current market price. Like buy limit orders, sell stop orders are reduced by an amount equivalent to any dividends declared on the ex-date, unless 'do not reduce' is selected in the 'additional order info' box in NetX360.

Stop limit orders combine a stop order with a limit order. They have two prices, a stop price and a limit price. The stop price, once achieved, triggers the limit order price. For example, XYZ is trading at \$15.00. A client originally purchased XYZ at \$10.00. To protect the gain, you enter a stop limit order with a stop price of \$12.00 and a limit price of \$12.00. Once XYZ trades at \$12.00, the stop order triggers, it becomes a sell limit order at \$12.00. If XYZ trades at \$12.00 or better again, the sell will execute. If XYZ continues to trade below \$12.00, the limit order will not execute. Stop limit orders run the risk of not executing if the stop price triggers but the security does not trade again at the limit price or better.

Another factor to consider with these order types is the Time in Force or Duration. By default, limit, stop and stop limit orders are good for the Day which means the order expires at market close on the day of entry. Other order durations include Good-till-canceled (GTC) which is good for 365 days, Good-till-date (GTD) which requires a date be entered through which the order is valid and Good-till-month (GTM) which is good for 30 calendar days from order date.

Extreme caution should be used when entering stop, stop limit and trailing stops orders. All representatives and clients should read and understand the PCS Stop Order Disclosure located under the Customer Disclosure section on the public side of pcsbd.net prior to using these order types. Please feel free to contact the PCS Trading Team at 502-992-1644 with any order entry related questions.

Custodial Account Reminders

As a result of recent regulatory actions, PCS thought it would be beneficial to remind you of the characteristics, obligations and procedures as it relates to custodial accounts.

Uniform Transfers to Minors Act and Uniform Gifts to Minors Act (UTMA and UGMA) accounts are custodial accounts established to transfer assets to minors without a formal trust. The custodian makes investment decisions on behalf of the minor until the age of majority at which time, the control goes to the minor as required by state law. The age of majority varies by account type and by state. PCS has published a guide to age of majority by state in the Advisor Resource Center entitled *Custodial Account Age of Majority*. Representatives should always consult state law for the most detailed and accurate information.



Shana Keil, Director Operations
and Account Services

Assets given to minors via an UTMA or UGMA account are irrevocable. Those assets cannot be taken back or transferred to a different beneficiary except in the case of the minor's death. In most cases, those assets would become part of the minor's estate. Funds can only be withdrawn by the custodian for the "benefit of the minor". Although the definition of "benefit of the minor" is vague, funds should never be withdrawn for general living expenses. PCS may require additional information or documentation for withdrawal requests during the life of UTMA or UGMA accounts.

Once the former minor has reached the age of majority, the representative should contact the custodian to begin the process of transferring the assets to the former minor's name. Pershing accounts where the minor has reached the age of majority will reflect in NetX360 *Items For Attention* under **Custodial Accounts - Minors Turning Majority Age**.

IBD-OFF-IP
RKF
ALL
ALL

Summary

Balances

Holdings

Projected Cash Flow

Order/Trade Status

Activity

Items For Attention

Documents

Accounts List

Commissions Summary

All IFAs | FYIs

Select: IFA Summary
View All Items
IBD#: RKF
OFF#: ALL
IP#: ALL

Action Items	No. of Items	Pending Approval	As of Date*
Margin Details		N/A	3/23/2020
Voluntary Corporate Actions			3/21/2020

FYIs	No. of Items		As of Date*
529 Plan Accounts with Uninvested Cash Balance			3/20/2020
Account Reopening			3/20/2020
Bonds Maturing Within Sixty Days			3/23/2020
Client Correspondence Letter			3/20/2020
Custodial Accounts - Minors Turning Majority Age			3/21/2020
Drafts 1099			3/16/2020
Fixed Income Rating Change			3/20/2020
IRA Participant Contributions			3/21/2020
IRS B Notices			3/20/2020
Incoming Account Transfers			3/23/2020
Insufficient Funds for Periodic Distributions			3/20/2020
Mandatory Offers			3/21/2020
Missing Account Opening Documentation			3/21/2020
Mutual Fund Periodic Order Reject Notification			3/23/2020
Outgoing Account Transfers			3/23/2020
Pending 1099			2/27/2020
Physical Securities Pending Documentation			3/20/2020
Positions Missing Cost Basis			3/21/2020
Potential Specified Adult			3/20/2020
Required Minimum Distribution			3/21/2020
Returned Mail - Lost Security Holder			3/20/2020
Revisions 1099			3/18/2020
UIT Termination Notifications			3/20/2020
Unfulfilled Mutual Fund LOIs			3/21/2020
Upcoming Significant Client Dates			3/20/2020
Wash Sales			3/20/2020

Click on the number alongside the alert type to view accounts.

IBD-OFF-IP | RKF | ALL | ALL

Summary

Balances

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Items For Attention

All IFAs | FYIs

Select: Custodial Accounts - Minors Turning Majority Age

IFA - Custodial Accounts - Minors Turning Majority Age

Account Status

Open
Display
ExportToExcel

Back

Short Name	Account Number	DOB	Expiration Date	State	Account Status
		10/31/1990	10/31/2011	INDIANA	Open
		1/29/1999	1/29/2017	KENTUCKY	Open
		7/6/2000	7/6/2018	KENTUCKY	Open
		10/17/1991	10/17/2012	NEW JERSEY	Open
		12/7/1997	12/7/2015	NEW JERSEY	Open
		11/11/1997	11/11/2015	KENTUCKY	Open
		4/20/1997	4/20/2015	KENTUCKY	Open

PCS will also periodically review custodial accounts and send notification to the representative. In most cases, a new PCS Customer Account Form and letter of instruction signed by the custodian is required to update Pershing brokerage accounts and PCS direct business accounts to the minor's name. Direct vendor requirements may vary but do not determine nor supersede what is required by PCS.

Situations may arise where a response is not received from the custodian or the custodian refuses to update the account. Representatives are advised to document contact with the custodian and any responses given during the attempt to transfer assets to the former minor. Representatives should notify Operations of any refusal to update an account or lack of response from the custodian. Operations may take steps to freeze the account, to the extent possible, until appropriate documentation for transfer is received. **Under no circumstances should a representative place trades or withdraw funds from an UTMA or UGMA account where the minor has turned the age of majority.** Questions regarding specific circumstances can be directed to the PCS Compliance or Operations Department.

REGISTRATION & LICENSING GUIDANCE:

Split Code Registration Requirements

Every year we go through the process of re-evaluating what state registrations are required to be maintained. This process is usually accomplished well by most representatives, however we are seeing a lot of deficiencies where one representative listed on a split code is not registered in a client state. Please remember that all representatives listed on a split code must be registered in the appropriate states for the clients assigned to the code. We ask that you review your book of business and verify your registrations are complete.

Also, if a representative on a split code resigns, please submit the change of rep form to Operations so the accounts can be updated.



Seth Owen
Director of Compliance

PCS PRODUCT APPROVAL:

Guidelines on Sales of Variable Annuities and Index Annuities

PCS has long had guidelines in place related to the sale of variable annuities and Equity Index products. With the wonderful growth in representatives over the last few years we thought it prudent to issue additional guidance related to these products. Please visit the Advisor Resource Center to read the product guidance issued by the Compliance and Principal Review Departments.



Kevin O'Bryan
Director, Client Relations

U4 UPDATE REMINDER:

Disclosure Reminder:

The FINRA form U4 must be updated in a timely manner (Usually within 30 days, but sometimes within 10 days) if any registered person has a disclosable event. These disclosable events include, but are not limited to, financial matters such as bankruptcy, compromise with creditors, or liens; legal matters; violations of industry rules; and other items related to outside business activities. Failure to disclose reportable items to the Home Office may result in delayed disclosure and significant late filing fees. Each late disclosure may result in as much as a \$1,575 late filing fee, which is the responsibility of the Representative to pay!

BUSINESS DEVELOPMENT UPDATE:

We'd like to welcome the following new groups to the PCS family:

- CMC Wealth Partners - Newtown, PA - 11/25/2019
- JK Private Wealth - Glastonberry, CT - 12/16/2019
- Lane Family Wealth - North Liberty, IA - 01/02/2020
- Palumbo Wealth Management, Great Neck, NY - 01/17/2020
- IVC Wealth, Silverdale, PA - 01/31/2020
- LGG Financial, Bethesda, MD - 02/12/2020
- Onyx Bridge Wealth Group, Tarrytown, NY - 03/06/2020



Steve Higdon,
Chief Development Officer

We also welcome the following groups and individuals who have joined our established partners:

- Sable Point Wealth, Bobby Cope, and Stones River all joined RFG Advisory
- Ethan Silverman joined Genex Consulting
- Michael Wright joined Materetsky Financial Group
- Joseph Yurglich joined Prime Capital Investment Advisors

MANAGING PRINCIPAL GUIDANCE:

A Few Thoughts...

"You may not always have a comfortable life, and you will not always be able to solve all of the world's problems at once, but don't ever underestimate the importance you can have because history has shown us that courage can be contagious, and hope can take on a life of its own." – Michelle Obama

Recently, I heard of a small group of co-workers who have been taking turns sharing positive thoughts, including the one above. Little did they know when they started back in January that a few words of encouragement each day would take on even greater meaning as a way of staying intentionally connected in today's world of social distancing and working remotely. One individual making a conscious choice to share something positive with someone else sends the message that we are in this together, whatever "this" may be, and can lighten the weight of daily challenges for both people.

Even with social distancing, we still interact with lots of people during the course of our day. I've noticed that folks are more willing to slow down a bit and ask, "How are you doing?" and really want to hear the answer for a change. That's sharing the courage to connect and strengthening hope through connection. That's the kind of contagious we can all welcome!

Your team of home office managing principals are making an extra special effort to reach out to the field, not just when something is missing on a form, but to genuinely ask, "How are you doing?" and care about the answer. I know without a doubt that those connections will long outlast the quarantines. Following are some additional thoughts from your managing principals.

Kelly: Action will always change things. Unknown.

Diana: You can't go back and change the beginning, but you can start where you are and change the ending. C. S. Lewis

Kyeshia: Stay positive even when it feels like your world is falling apart. Unknown

Jane: When faced with adversity, don't make change too complicated, just begin. Unknown



Ann Wilson
Director, Field Supervision

PCS STAFF UPDATES:

Joe Cutsinger (jcutsinger@pcsb.net) Joe serves as Executive Director. He joins PCS after a 27 year career at Hilliard Lyons where he served as an Executive Vice President. His experience includes brokerage and trust operations, finance, compliance and regulatory, information technology, underwriting and trading and advisory account solutions. He holds his Series 7, 27, 28 and 66 licenses. Joe is a CPA and graduate of Bellarmine University with a Bachelor of Arts in Accounting.

Julia Ironside (jironside@pcsb.net) Julia joins PCS after spending 25 years with Hilliard Lyons. She started her career there after college in Operations and moved to the Finance department where she became the Financial and Regulatory Manager. She prepared the firms internal and external financial statements, filed various regulatory reports to FINRA & SEC, and coordinated the financial aspects of regulatory examinations. She has a Bachelor of Science in Business Administration from the University of Louisville and holds her FINRA Series 7, 99, 27, 28, and 63. She enjoys spending time with her family and stays busy attending her children's sporting events. Julia joins PCS as the Financial and Operations Principal.

Becca Camann (rcamann@pcsb.net) Becca serves as an Operations Specialist with PCS. She has 5 years of experience in the financial services industry. Prior to joining PCS Becca served as an account maintenance representative at SII Investments. She enjoys spending her free time at home with her cat, Stanley, playing piano, cheering on Wisconsin (and Ohio State) sports teams, and experimenting with new recipes in the kitchen.

Samantha Bradshaw (sbradshaw@pcsb.net) Samantha joins PCS after being with Amerisourcebergen Consulting Services. She joined Amerisource as a Benefits Investigation Specialist. She now serves as the Branch Operations Assistant/Receptionist for PCS, providing administrative support to other PCS employees as well as presenting a warm and welcoming atmosphere for clients. She enjoys spending time playing the drums, spending time with her husband and training her German Shepherd, Daisy.

Please join us in welcoming Joe, Julia, Rebecca and Samantha to the PCS family.

COMPLIANCE UPDATE:**Regulation Best Interest - 90 days and counting:**

Everyone should now be aware that there are changes on the way related to process we take to make recommendations to clients about the types of accounts to open and recommendations for investment products within their accounts. The suitability rules outlined in FINRA Rules 2111 and 2090 are not going away, they are just being incorporated into the new rule. Regulation B.I. puts a greater burden on representatives and advisors, broker/dealers and RIA's to ensure recommendations made to retail customers are in their best interest based on individual circumstances, needs, and available products.



John Taylor-Jones
Chief Compliance Officer

The primary changes being implemented with Regulation B.I. relate to transparency of services, costs and conflicts of interest, and the ability of representatives and advisors to make recommendations that best meet the clients goals and objectives. What this means to most of us is that the amount of time needed to make the best recommendation will be extended to include multiple product reviews and discussions with the client to help determine which is "Best". In addition, the new regulation includes a higher level of documentation needed when reviewing and approving transaction recommendations. As we all have seen, there have been updates made to the PCS Purchase form in anticipation of these rule changes, and we anticipate some final edits as the June 30, 2020 due date gets closer.

I have received a number of inquiries related to the Form CRS. PCS is developing a 4 page CRS document that will be provided to all registered representatives for delivery to your new clients, and to clients who open new accounts after June 30, 2020. The delivery of Form CRS to current PCS account holders will be completed by the firm. PCS is required to disclose information on our Form CRS about the broker/dealer and PCS RIA, so if you have your own RIA, and therefore have prepared your own Form CRS, your clients will need to receive both disclosures when opening an account through PCS. This may cause some confusion so be prepared to explain the differences in the services provided to your clients.

PCS will be providing ongoing updates regarding Regulation B.I. over the next three months. These will be distributed in the form of Compliance Education Alerts and will be numbered for your convenience. Once complete we will create a FAQ and publish all information on the Advisor Resource Center. If you have not already done so, please complete the Regulation B.I. Training course in your Quest portal. The due date has been extended to May 30.

If you have any questions on Regulation Best Interest, please feel free to email Compliance@pcsbld.net with your question and someone from the Compliance Department will respond to your question.