



How Can PCS Assist You?

Accounting/Finance Department		
<i>Email address: accounting@pcsbd.net</i>	Things that we can assist with: Questions about invoices. Updating billing contact information. Fee/annual renewal questions	Technology Our Department Supports: QuickBooks
Administration Department		
<i>Email address: mwescott@pcsbd.net</i>	Things that we can assist with: Questions regarding E&O coverage/E&O certificates PCS and FINRA annual renewals	Technology Our Department Supports: Salesforce
Advisor Technology Solutions Department		
<i>Email address: ishoreshunt@pcsbd.net</i>	Things that we can assist with: DST Vision/Fanmail questions DTCC questions PershingX (Albridge) questions Quik! Forms questions Adding a new advisor to an existing group	Technology Our Department Supports: DST Vision/DAZL LaserApp PershingX (Albridge) Quik!
Advisory Operations Department		
<i>Email address: advisory@pcsbd.net Phone Loop: 1-800-966-9347 option 529</i>	Things that we can assist with: Orion operations and account maintenance Advisory trading Fee billing	Technology Our Department Supports: Orion Fiducient Schwab platform Fidelity platform
Business Development Department		
<i>Email address: Shigdon@pcsbd.net Email address: Chigdon@pcsbd.net</i>	Things that we can assist with: Onboarding new advisor groups Adding a new advisor to an existing group Referrals to PCS Business opportunities	Technology Our Department Supports: N/A
Business Transitions Department		
<i>Email address: businesstransitions@pcsbd.net</i>	Things that we can assist with: Onboarding new advisor groups Adding a new advisor to an existing group Carrier appointment questions Insurance licensing continuing education questions Book of business questions	Technology Our Department Supports: Basecamp Salesforce SureLC
Commissions Department		
<i>Email address: commissions@pcsbd.net Phone Loop: 1-800-966-9347 option 533</i>	Things that we can assist with: Commissions payment questions 1099 tax document questions Production reporting Split rep code and override questions	Technology Our Department Supports: JPass
Compliance Department		
<i>Email address: compliance@pcsbd.net Phone Loop: 1-800-966-9347 option 527</i>	Things that we can assist with: Adding or removing an outside business activity. Electronic communications and advertising review. Questions on firm element and regulatory CE. Email, text, and social media archiving. Political contribution approvals Seminar/conference reimbursements Regulatory audits of branch locations Advisor personal brokerage account approvals (3210 letters)	Technology Our Department Supports: CellTrust Due Diligence Works FMS Suites/Marketing Pro/Advisor Stream Global Relay RegEd (Continuing Education)
Information Technology Department		
<i>Email address: pcshelpdesk@pcsbd.net Phone Loop: 1-800-966-9347 option 3597</i>	Things that we can assist with: Advisor Resource Center password resets Questions about PCS website Questions about Technology as a Service General technology issues	Technology Our Department Supports: Advisor Resource Center pcsbd.net
Licensing & Registrations Department		
<i>Email address: registration@pcsbd.net</i>	Things that we can assist with: Adding or terminating a state registration Adding a new Rep, RSA, or NRF Terminating an existing Rep, RSA, or NRF Procuring a new split code Costs of state registrations Questions regarding FINRA registrations	Technology Our Department Supports: FINRA CRD
Operations Department		
<i>Email address: operations@pcsbd.net Email address: product@pcsbd.net Email address: trading@pcsbd.net Operations Phone Loop: (502) 992-1640 Trading Phone Loop: (502) 992-1644</i>	Things that we can assist with: Placing trades - Trading Trading activity or positions - Trading Form requirements for new accounts - Operations Account maintenance questions - Operations Pershing/NetX360 questions - Operations NetX360 password resets - Operations NetX Investor password resets - Operations Product inquiries - Product	Technology Our Department Supports: Docupace NetX360 NetX Investor
Supervision Department		
<i>Email address: prd@pcsbd.net Phone Loop: 1-800-966-9347 option 219</i>	Things that we can assist with: Paperwork requirements for new & existing business PTE 2020 requirements and process Docupace questions Approved product questions	Technology Our Department Supports: Docupace Due Diligence Works (DDW)