



Reminder of regulatory changes and requirements

Effective February 1, 2016, our Client Information Change Form and Group Partners Member Change Form have been updated. First, for clients who wish to update their address, two signatures are now required: either the client and advisor signatures or the advisor and authorized dealer signatures. B2B Bank Securities Services Inc. (B2BBSSI) will no longer accept client address changes made over the telephone by the advisor. Dealers are reminded that controls should be in place to ensure client authorization has been obtained for all client address changes sent to B2BBSSI including those sent by non-financial updates (NFUs) through FundServ.

Second, two signatures are now required for change in dealers: the client and an authorized dealer signature. An authorized dealer signature may include a branch manager, supervisor, compliance officer or anyone else authorized by the dealer to act on behalf of the dealer.

For more information, please contact Client Services at 1.800.387.2087.



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