

## Important information regarding the management of your BluVest Account

The BluVest investment advisory program is undergoing changes that will affect the nature of your BluVest account.

Specifically, effective as of 5:00 p.m. CST on May 31, 2018, HD Vest Advisory Services, the investment manager of your account, will cease to provide discretionary investment management services with respect to your account. For a variety of reasons, HD Vest Advisory Services determined that it is unable to continue managing your BluVest account. In particular, certain operational changes that would need to be implemented very soon would have resulted in an increase in your investment advisory fees, which would have effectively made the program more expensive and, therefore, less beneficial to you.

Your brokerage account will continue to be custodied at TD Ameritrade Institutional ("TD Ameritrade") for a period of time before being moved to TD Ameritrade's retail investor platform. Importantly, you will continue to have complete access to all of your assets in your account, and you will be able to access your account by visiting [www.advisorclient.com](http://www.advisorclient.com) until your account is moved to the retail platform at which point you will be able to access your account on [www.tdameritrade.com](http://www.tdameritrade.com). TD Ameritrade will send you additional information regarding your account. If you have trouble accessing your account via the TD Ameritrade website, please contact TD Ameritrade at 800.431.3500.

Because HD Vest Advisory Services will not be managing your account for the month of June, it will refund you a portion of the pre-paid advisory fees for the month of June via direct deposit to your BluVest account before the end of May. If you have questions regarding the refund of your June fees or questions specifically related to the previous management of your BluVest account, please send an email to [support@cs.bluvest.com](mailto:support@cs.bluvest.com) or call 800.214.9040.

We appreciate your understanding and thank you for your support of the BluVest program.

Regards,

HD Vest Advisory Compliance

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