

Subject: Important Reminder

Dear Client-

Remember, on May 3rd, 2025 your Grove Point accounts transferred to the new Broker Dealer, LPL Financial. We should be “live” on Tuesday, may 6th.

Some accounts will need to be re-papered, and we’ll send another email with more information and instructions later this week.

Those with Corestone checkbooks should destroy them as of 5/3. We will send you a separate email this week as to what will be needed to enable us to re-establish check writing through your new LPL brokerage account.

Heretofore, you have been able to access account value information on all of your accounts with us through a link on my website, www.pfsinc1.com. We will need to re-establish this access through our website after 5/3/25. So, access will be unavailable for a few days, and we’ll send you another email when it’s back up and available. Nevertheless, we'll have access to all information you might need during this transition period.

We’ve worked hard to do everything possible to ensure as seamless a transition as possible. Of course there may be some hiccups along the way. So we ask for your patience and understanding until everything is completed and back on line.

Best personal regards,

Bob Tucker and Faye West

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We strive to do business in a manner that results in your friends thanking you for having referred them to us.

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