



**Proxy season is approaching! We often hear from you asking if this is legitimate communication because it references an account you hold with LPL, but is nothing specific to your account. They are legitimate!**

Proxy season occurs between February and May. These communications come from a third party hired by mutual fund companies to encourage you to vote on topics at the upcoming annual shareholder meeting. This statement is usually an outline of topics that will be addressed during these meetings. It may also include proxy ballots, also known as a voting instruction form.

You can complete the proxy ballot and return it by mail, or vote by phone or online. Voting can influence the decisions of the board of directors and management teams, as well as impact the social and environmental direction of the company.

**Below are two options for proxy statements**

**E-Delivery** – There are three ways to request electronic email delivery of your proxy statement:

- Access [Account View 2.0](#) under the Paperless Settings link.
- Request the [Electronic Prospectus and Shareholder Communication Preference](#) form from our office.
- Register at [www.icsdelivery.com](http://www.icsdelivery.com) to receive information in email format and then follow the instructions provided.

**By Mail** – If deciding to have statements mailed, no further action is required. If you have had a change of address, please call our office to verbally confirm your updated information.

If you wish to object to LPL providing your information to issuers of client-owned securities for all nonessential mailings and communications, you may request that the [Information Disclosure Objection form](#) be completed.

If you have any questions on ways we may assist you further, please call the office, 603-294-4121.

Your Sage Team,

Tim, Anne, Caitlyn & Jessie



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