

“WHO TO CONTACT” LIST

We understand that situations arise, and whatever that situation is, our AWA team strives to provide you with exceptional service when you need it most. Below we have listed some common topics and this *WHO TO CONTACT LIST* is to ensure that this information is at your fingertips so you are able to get your questions answered quickly and efficiently.

<i>TOPIC</i>	<i>AWA TEAM MEMBER</i>
ACCOUNT INQUIRIES	EVA • JENNIFER
ADDRESS • PHONE • E-MAIL UPDATES	EVA • JENNIFER
APPOINTMENT SCHEDULING	EVA • JENNIFER
CASH MOVEMENT	EVA • JENNIFER
E-NEWSLETTER SUBSCRIPTION	EVA • JENNIFER
ESTATE PLANNING	STEVE • KAREN • DAVID
FORMS • PAPERWORK • DOCUMENTS	EVA • JENNIFER
INSURANCE • ANNUITY EVALUATION	STEVE • KAREN • DAVID
INVESTMENT ADVICE	STEVE • KAREN • DAVID
IRA • RETIREMENT PLANNING	STEVE • KAREN • DAVID
OBTAINING RESEARCH REPORTS	ANY TEAM MEMBER
ONLINE ACCESS	EVA • JENNIFER
PORTFOLIO REVIEW	STEVE • KAREN • DAVID
QUOTES	ANY TEAM MEMBER
REFERRALS	ANY TEAM MEMBER
SPECIAL EVENTS (CLIENT APPRECIATION EVENTS • SEMINARS)	EVA • JENNIFER
STATEMENTS	EVA • JENNIFER
TAX INFORMATION (COST BASIS)	ANY TEAM MEMBER
TRADE TRANSACTION	STEVE • KAREN • DAVID
TRANSFER PROCESS	EVA • JENNIFER
WEBSITE	EVA • JENNIFER
OTHER ISSUES	ANY TEAM MEMBER

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