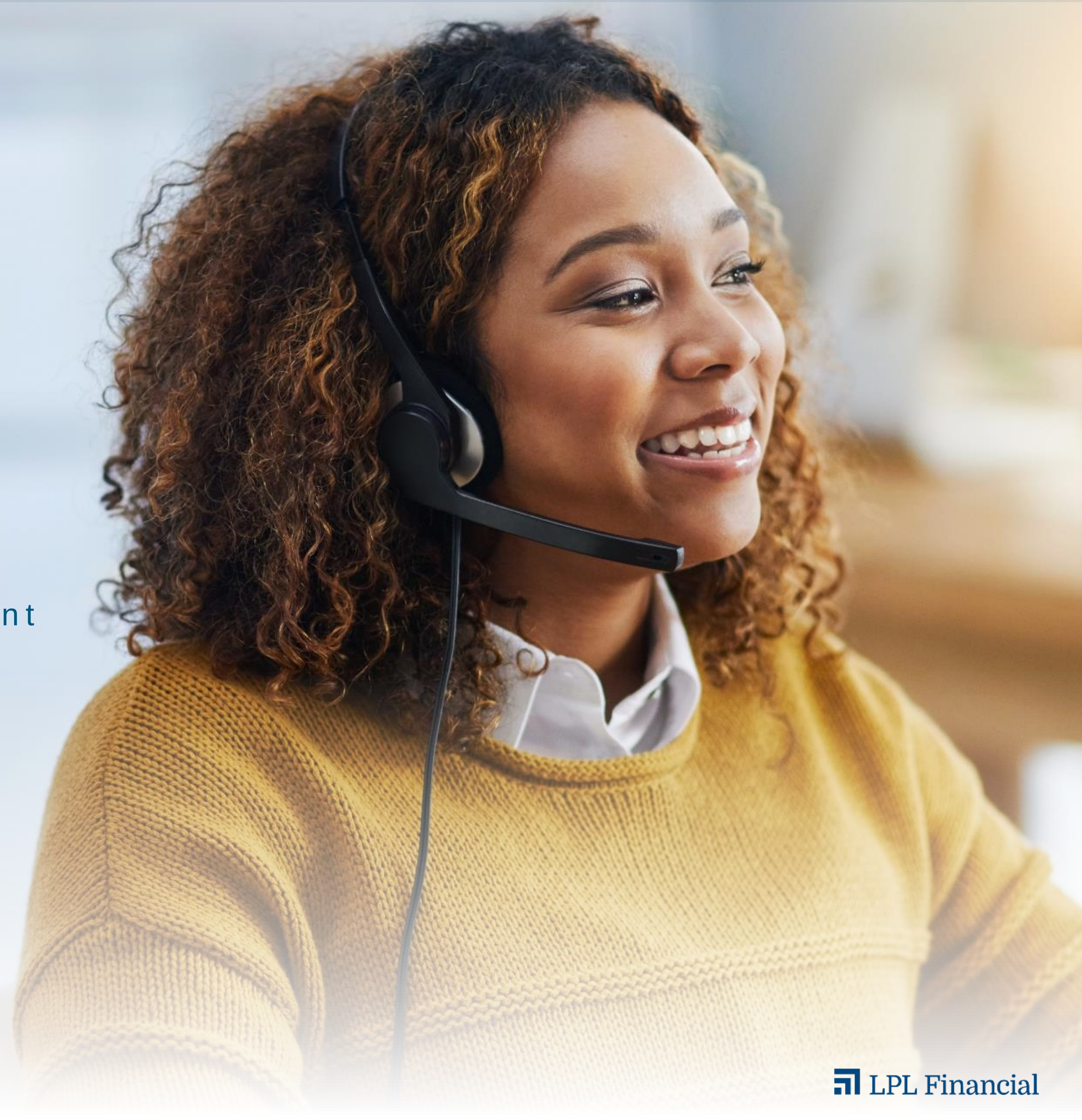
SERVICE 360

America Group Retirement Strategy Centers



Member FINRA/SIPC

LPL Financial

Team-Based: Dedicated Solution

SERVICE 360

FEATURES:

- Dedicated service from a small team who takes exclusive ownership of your service needs
- The opportunity to establish a personalized working relationship with your dedicated associates
- A single number to call
- Quicker, more direct processing of operational requests
- A single point of contact from start to finish, including issue resolution and follow-up

Dedicated Service360 is a team-based service solution that provides a personalized single point of contact focusing on the qualities that matter most to you:

Accuracy	**Consistency**	**Follow-Up**

Anthony Cole serves as your primary point of contact for America Group Strategy Centers service needs. Robert Scheeler, as leader of Team 17, has the ultimate responsibility for the team's delivery of outstanding service. He serves as your point of contact in the event a service issue requires escalation beyond your dedicated Service Professional. Please inform him how Dedicated Service360 can better service your firm and support you with achieving your goals.

SERVICE 360

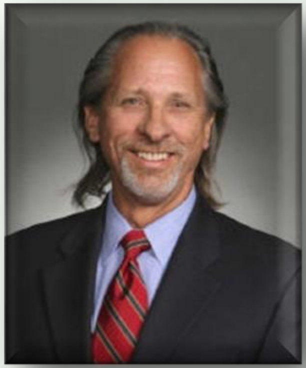
LEADERSHIP:

Service360 Team 17 – Dedicated Professional & Leadership

Anthony Cole

Dedicated Service Professional

Anthony joined LPL Financial with 7 years of customer service experience in real estate specializing in property taxes and insurance. Anthony's knowledge in Retirements, Advisory, Brokerage and New Accounts as well as his strong relationship management skills with his previous Service360 team helped him transition to a Dedicated Service360 position.



Robert Scheeler

Manager

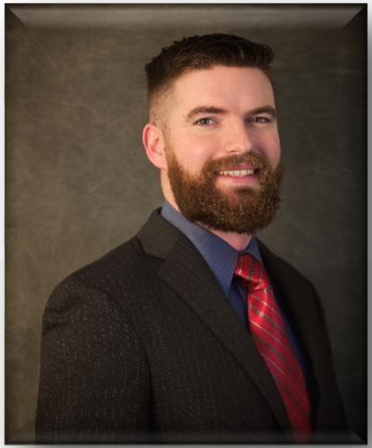
Bob joined LPL Financial in 2006 after a 30 year career in the United States Navy. He started his second career at LPL in the Service Center as a Service Center Associate and quickly advanced to a supervisory role. Bob' s extensive experience on the Dedicated Platform led to his selection to manage Team 17 having previously managed a Dedicated RIA Service Team. With previous experience at Edward Jones as an Investment Representative, Bob brings a unique perspective to the service organization. He holds FINRA series 7 and 63 licenses.

Service360 Team 17

Scott Henderson

Service Professional

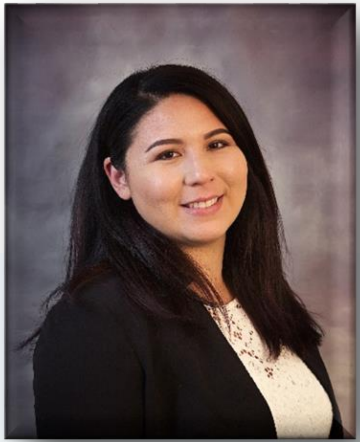
Scott began his career at LPL Financial in 2006 as a Service Center Associate, specializing in brokerage and new accounts. Throughout the years, he has trained several associates on new accounts and has assisted team members on the new accounts Service Support line. Prior to LPL, Scott was a registered Advisor with AXA. He graduated with a Business Administration degree from the University of San Diego.



Michael McDonagh

Service Professional

Michael McDonagh was born and raised in the city of Boston. After Graduating from the University Of Massachusetts in 2012, Mike enlisted in the United States Marine Corps and is currently a sergeant assigned to a reserve unit in San Diego as an Intelligence Specialist. Mike joined LPL in May 2015 where he started as a General Service Center Associate and then became a peer coach for new hires within the Service Center. Mike brings his knowledge, commitment, and strong customer service skills to Service360

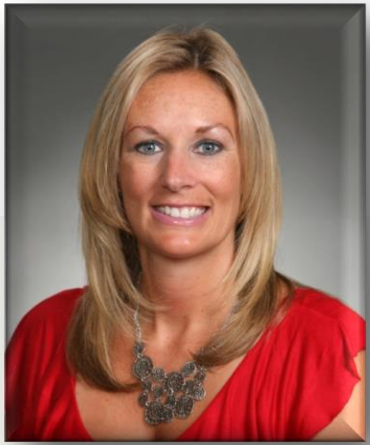


Sara Oatt

Service Professional

Sara began her professional career at LPL in the Alternative Investments Department and later transitioned to the RIA Service360 Team. In 2013, she graduated with a Bachelor's of Arts Degree in Finance from National University. Prior to joining LPL, Sara worked as an Financial Advisor's Assistant at an Investment Firm and has been in customer service for five years. Sara is born and raised in San Diego, California. During her free time, she enjoys traveling and spending time with her family. She holds FINRA series 7 & 63 Licenses.

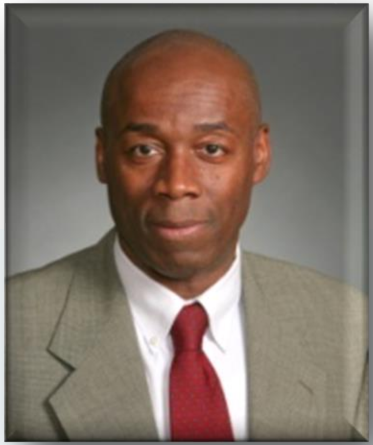
Service360 Team 17



Amy Pierce

Service Professional

Amy began her career at LPL Financial in 2011 as a Service Center Representative, specializing in Advisory, Retirements, Brokerage and Client Services. Prior to joining LPL Financial, she worked in the insurance industry. Amy is originally from Indiana and attended Purdue University



David Williams

Service Professional

David was born and raised in Connecticut. He lived there until he joined the United States Air Force. He later worked for Franklin Templeton Investments for 9 years as an Institutional Services Relationship Associate where he assisted relationship managers, responsible for providing service to more than 300 institutional and high-net worth clients. He began his career at LPL Financial in 2006 as a Service Center Associate, specializing in advisory and brokerage as well as mutual funds and exchange traded funds

Service360 Team 17 - Navigating Service

Dedicated Service360 Team Features

- Single point-of-contact for questions covering multiple areas or issues
- A team manager who are easy to reach and take ultimate responsibility for their team's delivery of outstanding service and/or are your escalation point of contact
- The opportunity to establish close working relationships with your Dedicated Service360 team members
- Members of the team sit in a shared work space where they can provide each other with updates on your business and your needs, and can easily collaborate to deliver speedy, consistent results
- Proactively inform your staff of updates to LPL policies and procedures

- Perform complex research on technical and transactional items:
  - New Accounts, Direct Business, Account Transfers, Brokerage, Advisory and Move Money (Money Movement)
  - Retirements (IRA's), Managed Accounts, Death and Divorce
- Dedicated Service Professionals are empowered to perform certain operational tasks to provide first call resolution
- Unsure of who to call? Contact your Dedicated Service360 team

Managed Outside the Dedicated Service360 Team

If you need assistance from any of the following teams, you can reach them directly or reference the Dedicated Service360 phone menu provided on the next page.

- Trading
- Annuity Order Entry - via Trading option
- Technical Support
- Compliance and Registration
- Alternative Investments
- Retirement Services (QRP's and Advanced IRA's)
- Client Compensation
- Sales and Insurance Group
- Marketing
- Conference Services: option 0 ext. 6800
- Financial Planning: option 0 ext. 6600
- Research: option 0 ext. 4755
- Private Trust Company(PTC): option 0 ext.7990

Contact Us

LPL Mailing Address
LPL Financial Attn: *Name of Specific Department*
P.O. Box 509029
San Diego, CA 92150

LPL Overnight Mailing Address
LPL Financial Attn: *Name of Specific Department*
1055 LPL Way Fort Mill, SC 29715

Service360 Telephone Menu 833-921-4855

1	2	3	4	5	6	7	8	9
Trading	SERVICE 360 TEAM	Technical Support	Compliance & Registration	Alternative Investments	Retirement Services	Client Compensation	Sales & Insurance	Marketing

For Specialized Teams When Prompted

Say Firm Name
or
"Team 17"

Say
"Move Money"
Keywords: ACH, Checks, Journals, Wire Deposit

Say
"New Accounts/Account Maintenance"
Keywords: Customer Identification Program (CIP), New Account

Say
"Account Transfers"
Keywords: ACAT, Transfer Status, Letter of Acceptance (LOA)

Say
"Direct Business"
Keywords: Rep Maintenance, Data Networking, Outside Account

Contact Us

If you have a concern that you'd like to escalate, please use the contact information below, starting with your Dedicated Service Professional.

Dedicated Service360 Team 17 Escalation Path

Anthony Cole
Dedicated Service Professional

833-921-4855

Anthony.ColeService360Team17@lpl.com

Robert Scheeler
Manager

858-909-7594

Robert.Scheeler@lpl.com

Melissa Wierman
Assistant Vice President

858-779-5826

Melissa.Wierman-Parker@lpl.com