



intellicents®

an important note from intellicents on COVID-19

*what we're doing to keep our intellicents
team healthy while still focusing on both the
financial and overall well-being of our clients.*



As the novel coronavirus (COVID-19) outbreak is now directly impacting all our communities, we want to connect directly with you about the steps we are taking across our businesses and locations.

In dealing with COVID-19 virus, our principal objectives are twofold:

1. The health, safety, and security of intellicents team members, their families, and our clients,
2. To exceed expectations in serving the needs of our clients during these unsettling times.

Our message to you is simple -
We are here for you.

Our Collective Health and Well-being:

As stated above, our first priority is to protect the health of our team members, their families, and our clients.

As such, intellicents has adopted an optional work from home policy for every intellicents team member. Our technology infrastructure is almost entirely cloud-based making this a very easy transition for our team members. Our team can execute the very same tasks at home that they can accomplish by sitting at their desk in our offices.

This optional policy is mandatory for any team member that has conducted recent significant travel, has experienced any sort of cold or flu-like symptoms over the past

14 days, or has been in direct contact with anyone that has experienced cold or flu-like symptoms over the past 14 days.

If any member of our team becomes ill from COVID-19 or needs to quarantine as a precaution, we will be providing additional paid time off so that they can focus solely on keeping themselves and family members healthy and safe.

We are instituting social distancing policies for team members working onsite at intellicents locations. These social distancing policies are consistent with recommendations from federal, state, and local health officials. These social distancing policies apply to how intellicents team members interact with each other, and how we interact with clients in the event an in-person meeting is absolutely necessary.

Serving our Clients:

Even during this time, we are dedicated to building and growing personal relationships with our clients and each other and have lots of ways to do that. Wherever possible, we're using our technology to work with you. That could be a phone call, a secure text, or connect via online web conferencing. Whatever works best for you.

Therefore, we are highly encouraging that if at all possible that client interactions take place over the phone or via web conferencing. To facilitate web conferencing, we have incorporated Zoom meeting technology at all locations.

To participate in a Zoom meeting, your intellicents team member will send you an invitation via email. All you need is your home computer and an internet connection. Audio can be facilitated via your computer or your phone with a designated phone number for you to call.

Until further notice, all meetings with our corporate clients including meetings with corporate committee members and plan participants will need to take place virtually via one of these mediums.

Our advisors can meet in-person with individual personal financial management clients if an in-person meeting is collectively deemed absolutely necessary. Meetings at one of our office locations will be available by appointment only arranged directly with your intellicents advisor.

As a precaution for you and for us, we'll ask you some questions before visiting any of our team members in person:

- Have you or someone in your household traveled via airplane or been on a cruise in the last 14 days?
- Have you or someone in your household had any direct contact with someone with coronavirus?
- Have you or anyone in your household had any cold or flu-like symptoms in the last 14 days?

If the answer to any of these is yes, the conversation should be done by phone or web conference.

Internally, our team is dedicating virtually all resources to pushing out information to all our clients and the general public. Every team member knows that they are to double their efforts in making sure we can exceed expectations in servicing our clients.

intellicents is very well positioned to meet these priorities because of the significant investments we have made in building the best team empowered with the best technology in our industry. We have great confidence in the future but know the next few weeks will be incredibly challenging for many people. We are ready to help as we can. It is our privilege to serve you today, tomorrow, and beyond.



intellicents®