Dear [Client Name],

We’re excited to announce some significant enhancements to the Client Asset Management (“CAM”) program available through CUSO Financial Services, L.P. Recognizing the importance of your investments as part of your overall financial plan, we are continually striving to improve our capabilities. Today, we are delighted to share that the launch of our newly enhanced service offering will also include a *reduction* in the fee rate. Effective in October 2018, the advisory fee rate will be *reduced* for your CAM [insert type of CAM account] account.

You do not need to do anything as your account will be updated automatically to reflect the price reduction. You will see the result of the reduced fee rate in your next statement.

We assure you that our investment in CAM doesn’t stop here. Since helping you achieve your financial goals and objectives is among our very highest priorities, we are deeply committed to continually improving our investments services to you. I will be following up with you [Time Frame (ex. next week)] to share details and answer any of your questions about our enhanced capabilities. If you’d like to talk sooner, please give me a call at [phone number] to schedule an appointment.

Sincerely,

Financial Advisor Name, Approved Designation

Approved CFS Title

CUSO Financial Services, L.P. (member FINRA/SIPC) located at <Credit Union Name>

Phone Number

Fax Number

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(Recommended Additional Disclosure)

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