



WARBURTON CAPITAL

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TD Ameritrade has been acquired by Charles Schwab

What does the acquisition of TD Ameritrade by Charles Schwab mean for you?

We don't anticipate any major differences in your experience.

Your money will stay invested in the same manner it is today. Warburton will continue to monitor and manage your portfolio. This will not change our investment methodology.

At this time, the only change we expect is the logo at the top of your statements. We expect that this could still be over 12 months away. If anything further develops, you will be notified well in advance.



We encourage you to utilize our new Client Portal and Phone App rather than the TD Ameritrade login. If you are not set up with this yet, please let us know.



If you have a problem or concern, call us. We will continue to be your point of contact and provide you the same level of individualized service we always have.

Our goal, as always, is to guide our clients through a life of financial purpose.

If for any reason questions or concerns arise, please don't hesitate to reach out.
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