

## *A Note to Our Valued Clients*

As we all know, disaster can strike, be it a natural disaster or an isolated event, and create a business disruption. We take this possibility very seriously and have taken many steps to help mitigate the potential impact on our clients and employees. In the event that operations of BaldwinClarke are impacted by a significant business disruption, we have partnered with Agility Recovery Solutions, a nationally recognized third-party business continuity organization. With the aid of Agility, a former unit of General Electric with over 20,000 North American clients, we have developed a business continuity plan designed to have our office up and running as soon as possible following the interruption.

Unfortunately, it is not possible to plan for every event and contingency. With that in mind, during the time that our office may be offline and not accessible, you can secondarily reach out to your fund company, insurance company, or custodian directly for account service through the following channels until we are once again able to serve you.

### **Charles Schwab & Co**

Website: [www.schwaballiance.com](http://www.schwaballiance.com)  
Phone: 800-435-4000

### **TD Ameritrade**

Website: [www.advisorclient.com](http://www.advisorclient.com)  
Phone: 800-431-3500 Option 3

### **The Standard**

Website: [www.standard.com/retirement](http://www.standard.com/retirement)  
Phone: 800-858-5420

### **Pentegra Retirement**

Website: [401ksave.net/participant/](http://401ksave.net/participant/)  
Phone: 866-633-4015

### **Proteus Capital**

Website: [www.proteuscapital.com](http://www.proteuscapital.com)  
Phone: 317-653-2756

### **Vanguard**

Website: <https://investor.vanguard.com/my-portfolio/>  
Phone: 800-662-2739

### **Ascensus**

Website: [www.Ascensus.com](http://www.Ascensus.com)  
For employee in a plan: 888-652-8086  
Web-access for employee: [www.myaccount.ascensus.com](http://www.myaccount.ascensus.com)  
For ER/business owner: 888-652-8087  
Web-access for ER/business owner:  
[www3.sponsorsight.com/ascensus](http://www3.sponsorsight.com/ascensus)

### **Guardian Life Insurance Company**

Website: <https://signin.guardianlife.com/customeraccess>  
Phone: 800-441-6455

### **Guardian Investor Annuity Company**

Website: <https://signin.guardianlife.com/customeraccess>  
Phone: 800-221-3253

### **Mass Mutual (for life, DI, LTC & annuity products)**

Website: [www.massmutual.com](http://www.massmutual.com)  
Phone: 800-767-1000

### **Lincoln Financial Securities**

Website: [www.lfg.com](http://www.lfg.com)  
Phone: 800-258-3648

### **Nationwide Financial Securities**

Website:  
[www.nationwide.com/investments-and-retirement.jsp](http://www.nationwide.com/investments-and-retirement.jsp)  
Phone: 877-669-6877

### **American Funds Service Corp**

Website: [www.americanfunds.com/individual](http://www.americanfunds.com/individual)  
Phone: 800-421-4225

### **American Funds Retirement Plan Services**

[www.americanfunds.com/retire](http://www.americanfunds.com/retire)  
800-421-6019

### **Prudential Annuities**

Website: [www.prudential.com/personal/annuities](http://www.prudential.com/personal/annuities)  
Phone: 888-778-2888

### **Local Guardian General Agency**

National Financial Network, LLC  
261 Madison Avenue, 27<sup>th</sup> Floor  
New York, NY 10016  
Phone: (212) 764-6262  
Website: [www.natfin.net](http://www.natfin.net)

To access your contracts or accounts via the providers' websites listed above, you may need to set up a username and password before being able to log in to your account. Should this be the case, we, of course, are happy to walk you through this process. Please contact us at 800-639-2711 and we will be pleased to assist you.