

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. If operations of BaldwinClarke are impacted by a significant business disruption, we have partnered with Agility Recovery, a nationally recognized third-party business continuity organization. With the aid of Agility, 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
Phone: 800-515-2157

TD Ameritrade

Website: www.advisorclient.com
Phone: 800-431-3500 Option 3

The Standard

Website: www.standard.com/retirement
Phone: 800-858-5420

Pentegra Retirement

Website: 401ksave.net/participant/
Phone: 866-633-4015

Proteus Capital

Website: www.proteuscapital.com
Phone: 317-653-2756

Vanguard

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

Ascensus

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

Guardian Life Insurance Company

Website: www.guardianlife.com
Phone: 800-441-6455

Guardian Investor Annuity Company

Website: www.guardianlife.com
Phone: 800-221-3253

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

Website: www.massmutual.com
Phone: 800-767-1000

Lincoln Financial Securities

Website: www.lfg.com
Phone: 800-237-3813, option 1

Nationwide Financial Securities

Website: www.nationwide.com/personal/investing
Phone: 800-848-6331

American Funds Service Corp

Website: www.americanfunds.com/individual
Phone: 800-421-4225

American Funds Retirement Plan Services

Website: pr.retire.americanfunds.com
Phone: 800-421-6019

Prudential Annuities

Website: www.prudential.com/personal/annuities
Phone: 888-778-2888

Local Guardian General Agency

National Financial Network, LLC
261 Madison Avenue, 27th Floor
New York, NY 10016
Phone: (212) 764-6262
Website: 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.