

PLEASE BE ADVISED!

Worldsource Financial Management has launched a new client access website for you to view your accounts.

Please note WFM is doing their best to provide the utmost quality of service; however, there are a few areas that Perler Financial has discovered and have brought to WFM's attention. WFM is in the process of rectifying these issues, so please be sure to revisit the site for any further updates. Please note, if you have any questions or concerns, please contact your advisor directly to assist you – 604.468.0888.

Please note! Not all family plans may be listed online under your name, when they have been prior. If this is the case for you, please contact your advisor who will be happy to provide you with an update. WFM has been notified and this issue is in the process of being rectified.

Perler Financial Group has requested WFM to do the following:

- a. Provide our clients with a summary of their family portfolio values
- b. Include a HELP guide in addition to the posted abbreviations guide
- c. Provide our office with the ability to reset our clients' password, upon request of the client
- d. Have an option for the client to change their own password &/or username

If you have any concerns or inquiries pertaining to this system, please contact your advisor directly at 604.468.0888. Thank you for your patience during this transition.

Regards,

Harry Perler, CFP
CEO, Perler Financial Group
Worldsource Financial Services Inc.