

CreativeOne Entities Rebranding Timeline

ADV 2A – CreativeOne Wealth	Started April 1, 2022
ADV 2A – Sending to CreativeOne Securities & CreativeOne Wealth Clients	Starting April 25, 2022
Marketing Services Questionnaire – Live	Close of April, 2022
Wealth, Securities & Marketing Account Manager Kick-Off Meetings	Starting May – Sept., 2022
Client One Securities & ChangePath App Iconography Update	May 2, 2022
ADV 2Bs – CreativeOne Wealth & Securities IARs	Updated May 15, 2022
New Client forms – Securities & Wealth	Completed June 1, 2022
ChangePath.com Website Transition	Updated July 13, 2022
CreativeOne Wealth Email Reply Domain Change	June 13, 2022
Client One Securities & ChangePath Apps Name Change	July 13, 2022
CreativeOne Wealth Email Navigation to New Domain	Week of July 18, 2022
Docupace Updates – CreativeOne Securities	End of July, 2022
Submission of New Forms (old forms retire)	August 1, 2022
Final Follow-up Checks with Offices	Starting January – March, 2023
All Marketing Collateral Updated	April 29, 2023

***Emails – more information to come.*



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