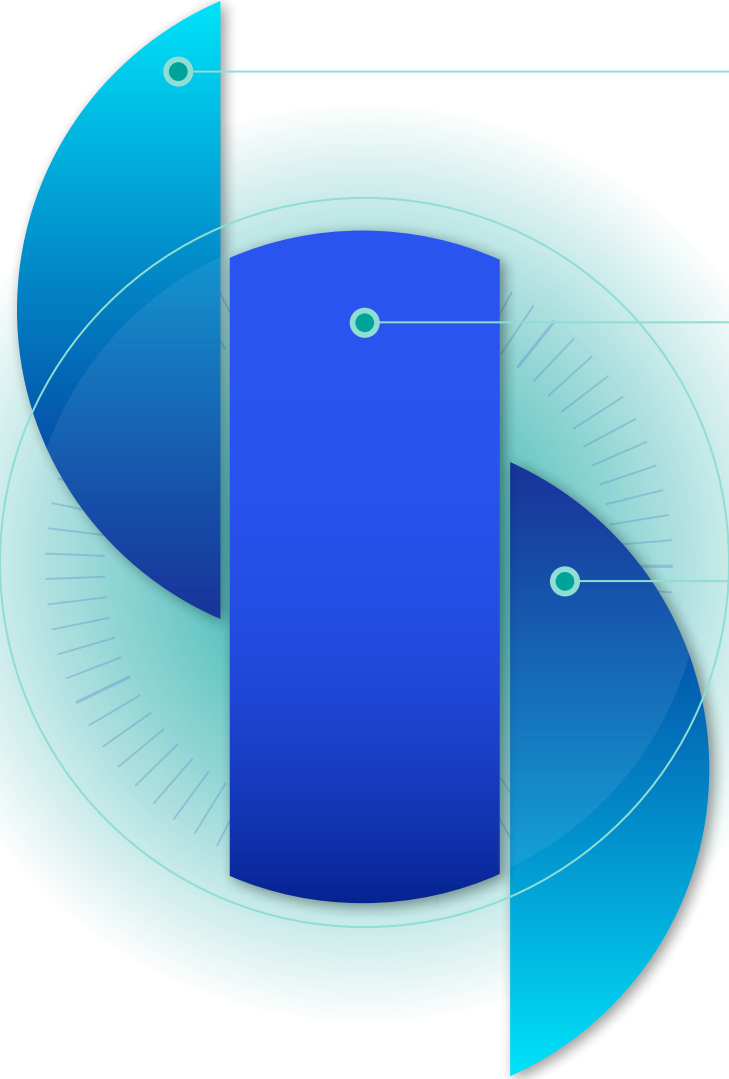


APEX SERVICE EXPERIENCE

# Faster resolutions Fewer calls

Hang up on the hold music and legacy custodian delays.  
Say hello to a whole new level of service.



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## **We help you avoid common problems**

Real-time capabilities mean fewer moments when you need to ask a custodian for help at all.

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## **We give you power at your fingertips**

Handle client demographics, preferences, user permissions, and more in just a few clicks.

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## **We've got your back**

Your dedicated service team is here for you, especially in the urgent, complicated, exceptional moments when it matters most.

# 1 point of contact

to call or message when you need the personal attention of your dedicated team

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# The infrastructure of next-level service

We believe the best service is built to anticipate your needs and get ahead of common challenges wherever possible. So we built an infrastructure that offers exactly that. Our technology doesn't just take orders — it takes initiative.

**60**seconds  
to submit a service request online

**30**minutes  
to get a response during  
U.S. business hours

What will you do with  
all your extra time?

Let's talk about it

## Real-time capabilities

Account opening. Account funding. ACATS initiation (Automated Customer Account Transfer Service). Our straight-through digital processing means a wide variety of tasks that used to involve waiting or manual steps are now often accomplished in seconds.

## Built-in self-service tools

Apex Astra™, our advisory UI, is built to make it intuitive and efficient to handle many tasks yourself, like updating client information or creating new user permissions. You can also search the Apex Service Center for quick how-tos when you need them.

## Digital service center

Submit a service ticket in less than a minute\* and expect a response within 0.5 business hours.\*\* Monitor progress with a single ticket number.

## Personalized service team

Handle urgent escalations or personalized requests directly. Your relationship management team is on it.

## Proactive education on service topics

We reach out with tailored suggestions and updates, helping you preempt potential snags.

\* In demonstrations, service center tickets can be completed and submitted in under a minute. Apex proprietary data as of 8/1/24.

\*\* Apex proprietary data 1/1/24-6/30/24.



Apex Advisor Solutions empowers the future of wealth management with digital custody and clearing provided through Apex Clearing Corporation.\*

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