



Coronavirus Operations Memo

Magnus Financial Group Remains Here to Assist

During the Coronavirus crisis, **we continue to be in close contact** with our clients using all technology available.

If you need assistance, please do not hesitate to reach out to your Magnus team.

Means of Communication

- You can continue to reach us at the same **phone numbers** you are accustomed to using.
- If you have trouble reaching your team by phone, please try **email**.

Asset Transfers

- You can send money through wires and ACH transfers instead of using checks -- please inquire with our Investment Operations team, email address is

investment.operations@magnusfinancial.com

- If you must deposit a check, please send to the following as applicable:

- **Charles Schwab & Co.:**

- Charles Schwab & Co.
IST East 12
1958 Summit Park Dr
Orlando FL 32810

- **Checks to be written to “Charles Schwab & Co.”; please include account holder name & account number on the memo line**

Asset Transfers (cont'd)

- **Fidelity Investments:**

Standard Mail:

Fidelity Investments
P.O. Box 770002
Cincinnati, OH 45277

Overnight Mail:

Fidelity Investments
100 Crosby Parkway
Covington, KY 41015

****Checks to be written to “Fidelity”; please include account holder name & account number on the memo line****

- **American Funds:**

American Funds
5300 Robin Hood
Norfolk, VA 23513

****Checks to be written to “American Funds”; please include account holder name & account number on the memo line****

Asset Transfers (cont'd)

- **JPM 529:**

New York's 529 Advisor-Guided College Savings Program
95 Wells Avenue, Suite 155
Newton, MA 02459

Checks to be written to “New York’s 529 Advisor-Guided College Savings Program”; please include account holder name & account number on the memo line

- **Do not send physical securities** without speaking to your team first.
- To avoid potential fraud, be sure to **verbally confirm** all transfer instructions received by email even if they seem to come from a recognized source.

Documents and Signatures

- Please use **electronic signature** if requested by Magnus' Investment Operations team.
- In lieu of wet ink signatures, we may be able to receive **copies of signed documents** which can scanned or faxed to us at (212) 202-7670. Originals may still be required.
- If you must send documents by email, you should **protect your documents with a password** and communicate the password to your team verbally. Check your document application's support feature for assistance with password-protection.
- You should **keep receiving statements** in the **physical** or **electronic** format previously selected.

Trading

- **Do not include trading instructions** in voicemails. Please reach out to our team directly.

Stay Vigilant About Potential Scams

- **Be especially vigilant** about whom you provide information to and how you provide it. There has been an increase in scams as some hackers and scammers try to take advantage of the situation created by the COVID-19 virus.

BEWARE OF COVID-19 SCAMS SEEKING YOUR CONFIDENTIAL INFORMATION.

Scammers and hackers may try to take advantage you, especially during the evolving COVID-19 situation:

- They may **send emails and texts** that impersonate a legitimate company, charity, or government agency to get you to click a **fraudulent link** and share confidential information or lure you into fraudulent investment schemes.
- **Do not click on links or attachments** unless you expected the messages and/or know who sent them.

