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Address 1  
Address 2  
Address 3  
City, ST 00000

## Enterprise Wealth Services is becoming a part of RT Investment Services!

Greetings,

At RT Investment Services, each relationship matters, and we look forward to building a strong relationship with you. As you may know, Enterprise Bank and Rockland Trust received all the required regulatory approvals and joined forces on July 1, 2025. As a customer of Enterprise Wealth Services, we look forward to welcoming you to RT Investment Services.

RT Investment Services has a relationship with LPL Financial to offer our clients a full service broker-dealer relationship. Through LPL Financial we are able to offer access to a wide selection of products and services to address your individual needs. Over the next few months, we will be reaching out to you to personally introduce ourselves and speak with you about the conversion and transition from Enterprise Wealth Services to RT Investment Services. In the interim, Sophie Sun and Paul Landry with Enterprise Wealth Services will continue to provide the same level of support and advice to which you have been accustomed.

If you have any questions about your relationship, we encourage you to reach out to myself, Sophie, or Paul, who will be happy to assist. We also have a dedicated landing page with all the latest information at [www.RocklandTrust.com/Welcome](https://www.RocklandTrust.com/Welcome).

On behalf of RT Investment Services, welcome! Honoring you and your investment journey is our top priority, and we look forward to continuing to support your goals.

Sincerely,

Bradley Sanders  
RT Investment Services

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