

Hi [Client Name],

We're reaching out to let you know that you will soon receive a check related to your former Altruist account.

Why am I getting this check?

After a routine review of previously closed accounts, we identified additional funds that were due back to you. Because the account is no longer eligible for other fund transfer methods, we are issuing a check to bring the account to a zero balance. These funds are most likely from interest and/or dividend payments that were posted after your account was closed.

Please see check detail below:

Last 5 of Account Number	Account Type	Check Amount

Is this a taxable event?

For IRAs, this distribution will be coded as a normal or pre-mature distribution, depending on your age. You may have the option to complete a 60-day rollover, but you should consult with a qualified tax professional to understand your specific situation and any potential tax implications.

Why now?

Altruist has begun performing routine checks of all closed accounts to ensure any additional funds are forwarded to former clients appropriately. This check is the result of that review process.

If you have any questions about this check or need additional details, please reply to this email.

Best regards,

Altruist Support