Client Support

Winslow understands that clients rely on us to deliver highly personalized support and expert execution. Our professional compliance and operations departments are known for their relentless commitment to excellence, customer satisfaction and employing industry best practices. Winslow delivers the highest level of customer support and smoothly transitions accounts to our platform.

Key Brokerage Account Features and Services

- Check writing services
- ATM/debit cards
- Direct deposit
- LoanAdvance

Online account access links clients to:
- Up-to-date balance and holdings data
- Electronic statements, trade confirmations, and tax statements
- Download capabilities for Intuit Quicken® and Microsoft® Money

To learn more about working with

Winslow Brokerage Services, please call

(617)896-3500 or **1(800)556-8600.**

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Winslow Brokerage Services

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About Winslow

Winslow, Evans, & Crocker, Inc. was established in 1991 to meet the investment, brokerage, and underwriting needs of its three founding principals.

In 1999, industry professionals with decades of managerial experience joined the firm in order to continue and expand on the Boston-based broker/dealer's tradition of offering clients the advantages of a national wirehouse brokerage firm, with a local footprint and a focus on client care.

Today, Winslow continues that tradition. Our firm strives to give every investor access to the best service and products available, as well as a direct connection to an in-house team of industry experts with broad financial services expertise.

Winslow is a growing, employee-owned firm with offices in five New England cities. Our financial professionals have an average of more than twenty years of experience helping individual and institutional clients achieve their financial goals.

In order to provide our clients with premium investment services, Winslow has allied with Pershing LLC, a leading global provider of clearing and financial services, and a division of the Bank of New York Mellon. Pershing holds more than one trillion dollars of client assets in custody, while Bank of New York Mellon holds approximately $23 trillion in financial assets in custody.

The unique combination of Winslow's local presence and regional strategic alliances with Pershing's global reach directly benefits our clients. We provide them the personal attention of a customer-focused broker/dealer, and the innovative services of our regional partners with the support of a global custodian through a world-renowned financial services firm.

Pershing LLC carries excess coverage (which is sometimes referred to as "excess SIPC coverage") protection through a private insurance company, Customer Asset Protection Company (CAPCO), for the net equity of clients' securities positions and cash in their accounts in excess of the SIPC limits. Net equity refers to the value of clients' securities, plus cash minus any amount that may be owed, such as a margin loan. There is no dollar limit specific to CAPCO. Excess SIPC protection does not cover investment losses in customer accounts due to market fluctuation or other claims for losses incurred while these securities affiliates remain in business. Other restrictions apply. CAPCO is a captive insurance company licensed by the state of Vermont. More information on CAPCO can be obtained at www.capcoexcess.com.

Investment Professionals

Winslow's investment professionals develop ideas, identify investment opportunities, and work with our clients to manage their assets to help them achieve their financial goals.

Our professionals encompass a broad spectrum of expertise, from outstanding equity and fixed income specialists to personal financial planners.

Winslow offers clients a wide range of financial services and products:

- Turnkey and private label solutions to support high net worth clients
- 14,000 load and no-load funds from more than 450 fund families through Pershing's platform
- Winslow Preferred Portfolio program, offering investors a range of conservative to aggressive managed mutual fund portfolios
- Winslow's Separate Accounts Program, bringing specialized management to the individual client through some of the world's premier money managers, and offering a wide range of options to meet the needs of clients and customers alike

Trading Desk Services

As a full-service broker/dealer, Winslow offers a full array of investment products and services, including proprietary agency and equity trading, agency and principal fixed-income trading, as well as municipal underwriting. Winslow is committed to reaching the market with maximum price advantage for each and every client trade.

Winslow's Boston-based trading personnel oversee high-volume and specialty orders, and our fixed-income trading desk delivers exceptional access to new issue product.

Our offerings include:

- Equities
- Fixed-income securities
- Structured products
- CDs
- Options
- IPOs

Winslow provides a gateway to Pershing's Equity Market Making Desk, Agency Sales Trading Desk, Option Trading Desk, and a network of NYSE and AMEX floor brokers.

We base our market analysis on leading-edge research sources such as:

- Credit Suisse – one of the world's strongest research teams
- Standard and Poor's Market Scope, Select, and Second Opinion
- Value Line
- Morningstar
- Additional Wall Street services