BostonWealth STRATEGIES | SullivanKreiss FINANCIAL

A Merger of Boston Wealth Strategies and SullivanKreiss Financial

September 16, 2025

Merger Frequently Asked Questions

Client FAQs

General Questions:

Why are Boston Wealth Strategies and SullivanKreiss Financial merging?

- We are combining our teams to expand resources, deepen expertise, and provide a next generation of financial expertise to our clients and their families. Together, we will provide the same, boutique level of service and guidance with even greater capabilities. A key motivation for this merger is our shared vision of building a firm designed to last for generations, working toward what we call "the 100-year firm."

What will the new company be called?

- Our firms will be combining under a new name and brand. We will be having a formal name and brand reveal in late 2025.

Client Impact:

How does this merger affect me as a client?

- You'll continue working with the same trusted advisors and staff you already know. The biggest change is that you'll now have access to a larger team and more resources.

Will my advisor or primary point of contact change?

- No. Your relationship with your current advisor remains unchanged, and you'll continue to work with the same team who knows your goals and financial plan.

Will my investment accounts or financial plan be impacted?

- No. Your accounts, financial plan, and strategies remain in place.

Will my fees change?

- No. Your fee structure will remain the same unless otherwise communicated to you directly.

<u>Operations & Services:</u>

Will office locations change?

- No—both offices will remain open and available to you. As part of this merger, you now have the convenience of accessing our team at two locations:
  - Needham Office – 250 First Avenue, Suite 102, Needham, MA 02494
  - Westborough Office – 1700 West Park Drive, Suite 340, Westborough, MA 01581
- This expanded presence gives you more flexibility in how and where you meet with us.

Will my account login, client portal, or reporting change?

- For now, you'll use the same login and portal you always have. If changes occur in the future, we'll provide clear instructions and support to ensure a smooth transition.

What new benefits will I receive from this merger?

- By combining firms, you'll gain access to a broader range of specialists, enhanced technology, and expanded planning and investment solutions.

<u>Communication & Support:</u>

How will you keep me informed during this transition?

- We'll provide updates via email, our current website, and through your advisor.

Who do I contact if I have questions?

  - You can directly reach out to your advisor or call the office at:
    - Needham Office – 250 First Avenue, Suite 102, Needham, MA 02494
      - Phone: (781) 449-7000
    - Westborough Office – 1700 West Park Drive, Suite 340, Westborough, MA 01581
      - Phone: (508) 351-0770

Why should I feel confident in this merger?

- Both Boston Wealth Strategies and SullivanKreiss Financial share the same client-first philosophy. By coming together, we can strengthen our ability to serve you today and in the future.