



FORM CRS LINK UPDATE

APRIL 2024

MEMBER OFFICE WEBSITE FORM CRS LINK UPDATE:

Exchange Act Rule 17a-14(c)(3) and Advisers Act Rule 204-5(b)(3) require firms and registered representatives to post the current version of the CRS on their public websites (if either or both have one) in a location and format that is easily accessible for retail investors.

If the Valmark Form CRS is not already present on your site near other Valmark related disclosures/text, please take the necessary steps to update your website with the Form CRS link, ([Form CRS Link](#)) before May 15, 2024.

Adding the Form CRS link to your website does not require a resubmission of your website for approval, however, we will be performing reviews of websites starting May 30th to verify that Form CRS has been prominently displayed.