

This Investment Advisory Services Agreement (“Agreement”) is entered into between and agreed to by (Print Client Name(s) Here): _____ (“Client”) and Impact Partnership Wealth, LLC (“IPW”), a registered investment adviser located at 1688 White Circle NW, Marietta, GA 30066. By executing this Agreement, Client retains IPW to provide the services described in this Agreement.

1. INVESTMENT ADVISER AND INVESTMENT ADVISER REPRESENTATIVE

- a. Client hereby engages IPW as its investment adviser of record to provide investment advisory and asset management services to Client’s account(s), (collectively, the “Account”).
- b. IPW will provide these services through an appropriately registered and qualified individual who is an investment adviser representative of IPW (“IAR”). IPW reserves the right to appoint the IAR and/or re-appoint another IAR to Client, at its discretion.
- c. IAR is only permitted to act on behalf of IPW for acts contemplated under this agreement and to execute this agreement. IAR is not permitted to bind IPW in any other agreement.
- d. If IAR is no longer registered with IPW and IPW does not exercise its discretion to appoint a new IAR, refer to Section 23.

2. INVESTMENT ADVISORY SERVICES

- a. As Client’s investment adviser, IPW, through IAR, will provide the following investment advisory services to Client:
 - i. Prior to making a recommendation, IAR will obtain information from Client to determine Client’s financial situation, investment objectives, and risk tolerance.
 - ii. Assist Client in selecting a qualified custodian to maintain Client’s Account Assets and establishing one or more brokerage accounts at the selected custodian.
 - iii. Implement an investment strategy that is most appropriate based upon Client’s financial situation, investment objectives, and risk tolerance through the use of available investment products.
 - iv. Provide continuous and ongoing monitoring and management of Client’s Account consistent with Client’s financial situation, investment objectives, and risk tolerance.
 - v. Contact Client periodically to determine whether Client’s financial situation, investment objectives, or risk tolerance have changed, or if Client wants to impose and/or modify any reasonable restrictions on the management of Account.
 - vi. Be reasonably available to consult with Client concerning the Account.
- b. In addition to the services offered in Section 2(a) above, IPW offers a variety of additional services that Client may obtain under a separate agreement for an additional fee. These services may include financial planning services, retirement plan services, and other services. Please see IPW’s Form ADV Part 2A Brochure or Wrap Fee Disclosure Brochure or Client’s IAR for additional information on these additional services.
- c. Refer to IPW’s Form ADV Part 2A Brochure or Wrap Fee Disclosure Brochure for important information and disclosures about IPW’s advisory services.

3. INVESTMENT PRODUCTS

- a. Model Portfolio Solutions. IPW offers model portfolio selection services, which allows IPW to exercise discretion to implement a specialized investment strategy managed by either IPW IARs or Strategists (as defined in Section 4), called Managed Models. Managed Models are approved by IPW prior to being made available and are reviewed on a periodic basis.
 - i. IPW Advisor Managed Models

- A. IAR may design and maintain certain Managed Models that are available to Client as part of a recommended investment strategy by a particular IAR (“Advisor Managed Model(s)” or “AM Model”). IPW retains sole authority and responsibility for approving Advisor Managed Models, in accordance with the Policies and Procedures for such models. Only the AM Model(s) approved for use by Client’s assigned IAR may be recommended by such IAR.
 - B. When an AM Model is no longer approved for use, IAR will have 30 days to transfer assets in such AM Model to another investment strategy. If, after 30 days, the assets have not been transferred, IPW may take any such action that is consistent with the obligations to Client under this Agreement including, but not limited to, transferring the assets to another investment strategy maintained by IPW.
 - C. Advisor Managed Models require, at a minimum, an annual rebalance to keep the Advisor Managed Model aligned with the stated objectives of such model.
 - D. Client will not pay an additional fee for Advisor Managed Models. See Section 7 for information about fees.
- ii. Strategist Managed Models
- A. Strategist Managed Models are Managed Models that are designed and maintained by a Strategist. The models selected for Client are selected based upon Client’s financial situation, investment objectives, and risk tolerance and may change over time to meet Client’s goals and needs.
 - B. Additional Strategists and models are available on the IPW platform through, for example, a third-party marketplace.
 - C. A Strategist may select a mutual fund share class for inclusion in a Managed Model that is not the lowest cost share class available. When possible, IPW works with Strategists to ensure the Strategist is selecting the lowest cost share class available, however certain Strategists make their investment selections without input from IPW. In such cases, IPW implements the Managed Model as directed by the Strategist and does not screen for the lowest cost share class available.
- b. IPW Direct Asset Management Services. IAR will, in coordination with IPW, individually select the securities held in the Account on a discretionary basis. Client’s Account will be managed based on Client’s financial situation, investment objectives, and risk tolerance. Please review the IPW Form ADV Part 2A Brochure or Wrap Fee Disclosure Brochure for additional information.
- c. Third-Party Investment Manager Products – Specialized investment solutions that have various requirements such as, but not limited to, account minimums and investment experience.
- i. Examples (as of date of form of agreement, may change from time to time):
 - A. Alternative Income Products – funds that invest in private and public credit securities and other unconventional income-generating assets.
 - B. Donor-Advised Funds – funds that organize charitable giving through tax-deductible gifts and tax-free growth.
 - C. Diversifier Models – strategies that invest in securities with low or no correlation to equity or fixed income markets.
 - D. Environmental, Social and Governance (“ESG”) Investing – strategies with exposure to companies based on non-financial factors.
 - E. Hedge Funds and Risk Mitigation – private funds that invest in non-traditional assets.
 - F. Interval Funds – funds that offer unique goals and have limited periodic repurchase availability.
 - G. Real Estate and Opportunity Zone Funds – funds that invest in private real estate investments, public Real Estate Investment Trusts (“REITs”), or real estate that provides potential tax incentives through investments in designated low-income census tracts of real estate known as Opportunity Zones.
 - H. Private Equity – an alternative investment in privately-held businesses.
 - I. Separately Managed Accounts – a separate custodial account, containing a portfolio of assets managed by a third-party investment manager, according to the stated investment objective and strategy set by the third-party investment manager. The third-party investment manager has discretion to make investment decisions for the Account and is responsible for trading within the Account.

- ii. The specialized investment solution products are designed and maintained by third-party investment managers.
 - iii. Client may be required to enter into a separate agreement with the third-party investment manager.
 - iv. IPW does not directly monitor third-party investment manager performance returns.
- d. Additional Products and Services (may change from time to time):
- i. Additional products and services may be designed or maintained by IPW or third-party investment managers and made available to Client, from time to time.
 - ii. Client may be required to enter into a separate agreement with IPW or third-party investment manager for the provision of such products and services.
 - iii. Additional fees are governed by the separate agreement.
 - iv. Examples, include, but are not limited to:
 - A. Direct Indexing and Tax-Loss Harvesting strategies. These strategies involve purchases of a selection of the stocks within an index with the goal of replicating the index's risk and performance. Additionally, these products may provide tax-loss harvesting strategies.
 - B. Retirement Plan Services – Services and products may be provided to an employer-sponsored retirement plan pursuant to a separate agreement.
- e. Client may impose reasonable restrictions on the management of the Account, including the ability to instruct IPW not to purchase certain securities on behalf of Client, on Addendum III – Account Suitability and Risk Tolerance Questionnaire. Client is entitled to change the reasonable restrictions set forth at any time. All changes to the reasonable restrictions must be delivered to IPW in writing. Reasonable restrictions can impact product availability and performance relative to a benchmark, if applicable. Reasonable restrictions may cause Client's IAR to deviate from investment decisions they would otherwise make in managing Client's Account and, accordingly, may negatively impact or otherwise affect Account performance.
- f. IPW may require a minimum per account balance. Exceptions may be granted to this minimum if approved by both Client's IAR and IPW for Client's immediate family member or in anticipation of additional deposits in the near future. In addition, certain investment strategies may have a minimum account balance requirement. If Client's Account is not large enough to purchase all holdings in the allocations determined by the manager, then Account performance will differ from the reported model performance. Please review the IPW Form ADV Part 2A Brochure or Wrap Fee Disclosure Brochure for additional information.
- g. Client further understands that the services provided under this Agreement do not include financial planning, consulting, or any other similar service that is not expressly provided in this agreement. Client must execute a separate agreement to receive such services.

4. CLIENT DIRECTED ACCOUNTS

- a. As an administrative convenience to Client, Client may designate one or more Accounts to hold investment products that Client desires not to be managed by IPW but be visible to IPW for reporting purposes ("Client-Directed Account"). To open a Client-Directed Account, Client must have an online trading account with the custodian and direct Client's IAR to establish the Account as a Client-Directed Account.
- b. Obligations/Responsibilities. IPW's services related to a Client-Directed Account are limited to including the investment products in a Client-Directed Account in reporting provided to Client by IPW or the custodian and processing Account maintenance requests such as, but not limited to, money movement requests, address changes, and systematic distributions, at Client's direction, with the custodian. IPW will not make any recommendations, direct trades, or utilize investment discretion on a Client-Directed Account. Client shall provide all direction for trades directly to the custodian subject to the terms of Client's agreement with the custodian. Client is solely responsible for monitoring and directing trades in a Client-Directed Account, including, but not limited to, the choice of mutual fund share class and the fees associated with such share class choice. Client-Directed Accounts are not subject to the supervision, management, or oversight practices IPW provides in relation to its managed accounts as otherwise set forth in this Agreement or IPW's Disclosure Documents.

c. Conflicts and Disclosures

- i. A Client-Directed Account is neither managed nor advised by IPW. As a result, if, for example, Client owns mutual funds in a Client-Directed Account, Client may pay more for those mutual funds than if the fund was held in another IPW Account. IPW does not monitor to ensure Client is in the lowest share class available for a mutual fund and Client is solely responsible for the share class purchased and held.
 - ii. Client's accounts with the custodian, including a Client-Directed Account, are cash trading accounts. Cash trading accounts are subject to certain laws, rules and regulations that generally require that the account have sufficient cash available to pay for any trade by settlement. Failure to have sufficient settled cash in the account on the settlement date can result in one or more of the following violations: a good faith violation, a freeriding violation, and a cash liquidation violation. Such violations in any Client account, including a Client-Directed Account, could result in a temporary or long-term trading restrictions on all of Client's accounts, including Client's Accounts managed by IPW. Other situations can also result in trading or account restrictions being placed on Client's Account, including but not limited to day-trading, potential fraud, violation of anti-money laundering rules or regulations, or OFAC sanction control laws, or an incorrect mailing address on file for Client.
 - iii. The existence of any trading restriction on any Client account will render both Client and IPW unable to trade any of Client's accounts. As such, IPW will be unable to initiate trades or conduct other activities that may be required to manage Client's Account according to Client's advisory plan and/or instructions. If this occurs, Client's Accounts may be converted to non-managed.
 - iv. Client acknowledges and agrees that, because a Client-Directed Account is not managed by IPW, Client will be solely responsible for the consequences of any violation and for remediating any violation, if remediation is available. IPW does not assume any obligation to notify Client of a violation or trading restriction caused by Client, or to execute any transaction in a Client-Directed Account to remediate a violation or restriction. However, IPW may under certain circumstances undertake to remediate a violation or restriction subject to a separate written agreement between the Client and IPW.
- d. Fees. Client will not pay asset-based investment advisory fees for Client-Directed Accounts. Client will pay an annual administrative fee, paid in monthly installments, as set forth in the Fee Schedule. This annual administrative fee is independent from transactional fees initiated by the custodian. Transactions directed by the Client in the Client-Directed Account may be subject to transaction and other fees in accordance with the Client's agreement with the custodian. Please refer to the custodian's website for a list of the various fees and/or charges that Client may be subject to within the Client-Directed Account.

5. STRATEGISTS

- a. IPW approves, engages, and monitors various third-party portfolio providers and strategists (individually, a "Strategist" and collectively "Strategists") to provide investment products, model portfolios, and strategies through the IPW platform. Strategists and Strategist Managed Models are evaluated and monitored by IPW. Initial and ongoing due diligence is done on Strategist and Strategist models either by IPW or through a third-party diligence provider. If a third-party diligence provider is used, IPW does periodic diligence on the provider. IAR will be Client's primary contact for any questions concerning Strategists.
- b. If IPW recommends a Strategist to Client and the Strategist is registered as an investment adviser, IPW will provide the Strategist's Form ADV Part 2A or Wrap Fee Disclosure Brochure, which includes disclosures of the Strategist's services and fees. Investment advisory fees incurred by Client may increase when Client uses a Strategist. Any fees exceeding those set forth in the Client Fee Disclosure attached hereto shall be agreed to by the Client in writing prior to being charged.

6. THIRD-PARTY INVESTMENT MANAGERS

- a. IPW approves, engages, and monitors various third-party investment managers to provide direct asset management services (individually, a "Third-Party Manager" and collectively "Third-Party Managers"). If IPW recommends a Third-Party Manager to Client, Client may be required enter into an agreement for investment management services directly with the Third-Party Manager and to complete additional custodial authorizations permitting the Third-Party Manager to take action within the Account. IAR will be Client's primary contact for any questions concerning Third-Party Manager.

- b. If IPW recommends a Third-Party Manager to Client, IPW will provide the Third-Party Manager's Form ADV Part 2A or Wrap Fee Disclosure Brochure, which includes disclosures of the Third-Party Manager's services and fees. Investment advisory fees incurred by Client may increase when Client uses a Third-Party Manager. Any fees exceeding those set forth in the Client Fee Disclosure attached hereto shall be agreed to by the Client in writing prior to being charged. Initial and ongoing due diligence is done on Third-Party Managers either by IPW or through a third-party diligence provider. If a third-party diligence provider is used, IPW does periodic diligence on the provider. IAR will be Client's primary contact for any questions concerning Third-Party Manager.

7. INVESTMENT DISCRETION & TRADING AUTHORITY

Except as otherwise expressly stated elsewhere in the Agreement, Client grants IPW discretionary authority to make all decisions to buy, sell or hold securities, cash, or other investments for the Account in the sole discretion of IPW without first consulting with Client. Such discretionary authority includes, but is not limited to:

- a. Implementing selected model portfolio or other investment strategies for the Account by buying, selling, or holding for example, but not limited to, individual equity or debt securities, mutual fund shares, ETFs, and other securities that are represented in the selected model portfolio(s) or strategy/ies and subsequent changes to the selected model portfolio(s) or strategy/ies.
- b. Allocating Account assets among one or more investment strategies.
- c. Authority to hire and fire Strategists and Third-Party Managers.
- d. Authorize IPW to delegate discretionary authority granted to IPW hereunder to IPW's third-party service providers to carry out the objectives of this Agreement, including third-party service providers, broker dealers and custodians. Client authorizes IPW to provide a copy of this Agreement to any party to whom such discretionary authority is delegated as evidence of delegation of authority under this Agreement.
- e. The discretionary authority provided under this Section 6 shall not apply to Client-Directed Accounts.

8. FEES

- a. IPW charges investment advisory fees based on a percentage of assets under management, billed in arrears (at the end of the billing period) on a monthly basis, and calculated based on the average daily balance of the Account during the applicable current billing period. Fees are prorated based on the number of days service is provided during each billing period. If services commence in the middle of the billing period, then the prorated fee for that billing period will be billed in arrears at the end of that billing period.
- b. IPW allows IAR to set the exact investment advisory fee under this Agreement within ranges provided by IPW. As a result, Client's IAR may charge more or less for the same service than another IPW IAR would charge. Further, the annual investment advisory fee of IPW may be higher than that charged by other investment advisers offering similar services/programs.
- c. The annual fee for investment advisory services under this Agreement will be set forth in a Client Fee Disclosure Addendum which shall be incorporated into this Agreement upon execution.
- d. On a monthly basis, the investment advisory fee will be calculated and the qualified custodian(s) instructed to deduct such investment advisory fee from the Account, pay IPW in accordance with this Agreement, and pay investment advisory fees to other service provider(s), including if applicable, Strategists and Third-Party Managers, according to the agreements with such parties. Client authorizes the qualified custodian(s) of the Account to deduct the investment advisory fee from the Account in accordance with the instructions of IPW and pay such fee directly to IPW. At least quarterly, Client will receive statements from the qualified custodian(s) of the Account detailing transactions in the Account, including the investment advisory fee charged. Client should review the Account statements received from the qualified custodian(s) and verify that appropriate investment advisory fee is being deducted. The qualified custodian(s) will not verify the accuracy of the investment advisory fee deducted.
- e. Wrap Fee Account. Client's Account is a Wrap Fee Account. A Wrap Fee Account is an account in which Client will only pay a fee based on assets under management and Client will not pay a separate commission, ticket charge, or custodian fee for the execution of transactions in Client's Account. IPW and certain service providers, including (if applicable) the custodian, Strategist, and Third-Party Manager will receive a portion of the fee as compensation for services. Certain securities or Accounts may be billed by the custodian on a transactional basis if so designated on a Client Fee Disclosure including, but not limited to, fees relating to alternative investments or other Third-Party

Manager products. Client Directed Accounts will not be charged an investment advisory fee and are excluded from wrap fee calculations. Please refer to additional fee information in Addendum V – Client Fee Disclosure.

- f. Investment advisory fees incurred by Client may increase when Client or IPW elects to use a Strategist or Third-Party Manager. Any fee exceeding those set forth in the Client Fee Disclosure attached hereto shall be agreed to by the Client in writing prior to being charged.

9. CUSTODIAL SERVICES AND BROKERAGE PRACTICES

- a. Client will establish and maintain the Account through one or more qualified custodians approved by IPW (the “Custodian”). The Account will consist of all account(s) held under the name of Client at the Custodian(s). The Custodian(s) will maintain physical custody of all funds and securities of the Account, and Client will retain all rights of ownership (e.g., right to withdraw securities or cash, exercise or delegate proxy voting, and receive transaction confirmations) of the Account. Client’s beneficial interest in a security does not represent an undivided interest in all the securities held by the qualified custodian(s), but rather represents a direct and beneficial interest in the securities which comprise the Account. At least quarterly, Client will receive a statement from the qualified custodian(s) of the Account detailing transactions in the Account.
- b. Client agrees that all information regarding securities transactions will be provided pursuant to the Client’s agreement with their selected custodian.
- c. Client agrees that IPW has the authority to act in a manner consistent with the authority set forth in Client’s custodial agreement(s).
- d. Best execution. When IPW implements a recommendation, it is responsible to ensure that Client receives best execution for transactions. Best execution does not necessarily mean Client receives the lowest possible commission costs but that the qualitative execution is best. In other words, all conditions considered, the transaction execution is in Client’s best interest. When considering best execution, IPW may consider a number of factors other than prices and rates including, but not limited to:
 - i. Execution capabilities (e.g., trading expertise, ease/reliability/timeliness of execution, responsiveness, integration with IPW’s existing systems, ease of monitoring investments)
 - ii. Products and services offered (e.g., investment programs, back-office services, facilities, technology, regulatory compliance assistance, research and analytic services)
 - iii. Financial strength, stability, and responsibility
 - iv. Reputation and integrity
 - v. Ability to maintain confidentiality
- e. Block Trading. IPW and its service providers are authorized in their discretion (but are not obligated) to aggregate, batch, or combine purchases and sales and other transactions made for the Account with purchases and sales and other transactions in the same or similar securities or instruments for other accounts. When transactions are so aggregated, the actual prices applicable to the aggregated transactions will be averaged, and the Account will be deemed to have purchased or sold its proportionate share of the securities or instruments involved at the average price so obtained. IPW will endeavor to process all Account transactions in a timely manner, but IPW neither represents nor warrants that any such transaction will be processed or effected by the qualified custodian or broker-dealer on the same day as requested.

10. REPORTS

Client will receive statements of Account from the qualified custodian(s) at least quarterly. If Client does not receive the statement(s), notify Client’s IAR. Additionally, IPW will provide Client with access to on-demand account information and reports through an online client portal. Client is strongly urged to compare any reports received from IPW against Client’s Account statements received from the qualified custodian(s). Discrepancies between reports received from IPW and the statements received from the qualified custodian(s) should be reported immediately to IPW and the qualified custodian(s).

11. PROMOTER ARRANGEMENTS

- a. If Client was introduced to IPW through a promoter (“Promoter”), IPW may pay that Promoter a fee in accordance with Rule 206(4)-1 of the Investment Advisers Act of 1940 and applicable state law.

- b. The fee will be paid solely from the compensation of IPW as defined in this Agreement and will not result in any additional charge to Client. Promoter is compensated to refer Client to IPW in accordance with the approved practices of IPW, distribute to Client all required disclosures, review and complete all necessary forms, and acknowledgements, and applications with Client, obtain all appropriate Client signatures, and provide continuing contact to Client concerning investment advisory services of IPW. Promoter does not have authority to accept investment advisory agreements on behalf of IPW, to collect or receive payment in Promoter's own name for any investment advisory agreement nor provide investment advice or manage assets on behalf of IPW. All investment advisory agreements related to services provided by IPW are subject to acceptance by IPW.
- c. If Client was introduced to IPW through Promoter, Client hereby acknowledges receipt, as applicable, of Promoter's Disclosure Statement which disclosed the terms of the promoter arrangement between IPW and Promoter and the compensation to be received by Promoter from IPW.

12. ADMINISTRATIVE SERVICES PROVIDED BY SERVICE PROVIDERS

IPW may, in its sole discretion, hire/fire other service provider(s) who are engaged for the purpose of exercising discretion to buy/sell securities for the Account in accordance with the investment, model portfolios, and trade signals of selected Strategists and to provide due diligence on third-parties including, but not limited to, technology and administrative or back-office services related to the investment advisory services provided by IPW to the Account. Such services provided by service provider(s) may include, but are not necessarily limited to, due diligence of Strategists and Third-Party Managers, access to service provider's technology platform and/or assistance with data reconciliation, performance and/or position reporting, fee calculation and billing, marketing and presentation materials, client database maintenance, quarterly performance evaluations, payable reports, web site administration, order entry, and other functions related to the administrative tasks of providing investment advisory services to the Account. Due to these arrangements, such service provider(s) will have access to the Account and/or Client's information. Service provider(s) will charge a fee to IPW for providing administrative and back-office services, which may be based upon the value of the Account, however, any such fee is paid by IPW from the portion of the overall investment advisory fee charged by IPW.

13. ACCOUNT VALUATION

For purposes of calculating investment advisory fees, securities in the Account that are listed on a national securities exchange or on NASDAQ at the closing price will be valued on the valuation date, on the principal market where the securities are traded. Other securities or investments in the Account will be valued in a manner that IPW and its service provider(s) believe in good faith reflects the fair market value.

14. ERISA ACCOUNTS

If IPW provides advice to Client about securities in an employer-sponsored benefit plan or an account that is maintained on behalf of a plan, subject to the Employee Retirement Income Security Act of 1974 ("ERISA") or similar government regulation, IPW acknowledges that this advice would constitute investment advice to a retirement plan or to retirement plan assets for compensation and, as a consequence, such party would be deemed a "fiduciary" pursuant to Section 3(21)(A)(ii) of ERISA. IPW will act in good faith and with the degree of diligence, care, and skill that a prudent person rendering similar services would exercise under similar circumstances.

15. CLIENT'S RESPONSIBILITIES

- a. Client recognizes that the value and usefulness of the services IPW provides under this Agreement will depend upon the accuracy and completeness of the information that Client provides to IPW throughout the life of the Account. This includes, but is not limited to, initial and ongoing:
 - i. Client's communication of Client's financial situation to IPW;
 - ii. Client's active participation in the formulation of Client's investment objectives; and
 - iii. Client's participation in the implementation of the advice to attain those objectives.
- b. Client will promptly provide IPW all information and documents that IPW may reasonably request in order to permit a complete evaluation and preparation of the recommendations for Client. IPW will be permitted to rely on all information and documentation provided by Client and will not be responsible for the verification of the information and documentation provided by Client.

- c. Client may impose reasonable restrictions on the management of the Account on Addendum III – Account Suitability and Risk Tolerance Questionnaire, including the ability to instruct IPW or Strategist not to purchase certain securities on behalf of Client. Client is entitled to change the reasonable restrictions set forth at any time. All changes to the reasonable restrictions must be delivered to IPW in writing.
- d. Client will promptly notify IPW in writing of any material change to Client's financial situation, investment objectives, or risk tolerance or if Client wants to impose and/or modify any reasonable restrictions on the management of Client's Account.

16. NON-EXCLUSIVE RELATIONSHIP

Client acknowledges and agrees that IPW may manage investments for other clients and may give other clients advice or take actions for them, for IPW's accounts, or for accounts of persons related to IPW that is different from the advice IPW gives Client or actions IPW takes for Client. IPW is not obligated to buy, sell, or recommend for Client any security or other investment that IPW may buy, sell, or recommend for any other clients, for IPW's accounts, or for the accounts of persons related to IPW. If IPW obtains material, non-public information about a security or its issuer that IPW may not lawfully use or disclose, IPW will not disclose the information to Client or use it for Client's benefit.

17. BASIS OF ADVICE

Client acknowledges that IPW and other service provider(s) obtain information from a wide variety of publicly available sources. The recommendations developed by IPW are based upon the judgments of IPW. IPW and other service provider(s) cannot guarantee the results of any recommendations and models/trade signals.

18. RISK

- a. There are significant risks associated with investing in securities including the complete loss of all principal invested, and this risk applies even when the Account is managed in accordance with the investments, model portfolios, and trade signals of a recommended manager or Strategist. Past performance of any security does not indicate its future performance. IPW cannot guarantee the future performance of the Account, promise any specific level of performance, or promise that IPW and/or a selected Strategist's investment decisions, strategies, models, or overall management of the Account will be successful. Client represents that no party has made any guarantee, either oral or written, that Client's investment objectives, or any particular performance of any investment or the overall Account, will be achieved. For additional information, please refer to the IPW ADV Part 2A Brochure and the Wrap Fee Disclosure Brochure.
- b. Client acknowledges that asset withdrawals may impair achievement of Client's investment objectives.
- c. The investment recommendations of IPW and the investments, model portfolios, and trade signals available through IPW are subject to various market, currency, economic, political, and business risks, and will not necessarily be profitable. In supervising the actively managed Account, IPW will not consider any other securities, cash, property, or other investments of Client unless Client has told IPW to do so in Client's written instructions to IPW.
- d. Except as may otherwise be provided by law, IPW, Strategists, and other service provider(s) will not be liable to Client for any loss (i) caused by following Client's instructions, or (ii) caused by independent acts which were not pursuant to instructions of IPW, Strategist, or the other service provider(s). Federal and state securities laws impose liabilities under certain circumstances on persons who act in good faith, and this Agreement does not waive or limit, and is not intended to waive or limit, Client's rights under those laws.

19. CONFLICTS OF INTEREST

The following disclosures are provided regarding the background and business practices of IPW. For additional information, please refer to the IPW ADV Part 2A Brochure and Wrap Fee Disclosure Brochure:

- a. **Registered Representative.** In a capacity separate from IPW, certain individuals serving as an IAR of IPW are also a registered representative of a broker-dealer. Client is not obligated in any manner to utilize the services of any such broker-dealer. If Client elects to utilize the services of Client's assigned IAR in the IAR's separate capacity as a registered representative of a broker-dealer, Client should be aware that this individual may sell, for commissions, general securities products such as stocks, bonds, mutual funds, exchange-traded funds, variable annuities, and variable life products to Client. As such, this individual may suggest that Client implement investment advice by

purchasing securities products through a commission-based brokerage account in addition to or in lieu of a fee-based investment-advisory account. This receipt of commissions creates an incentive to recommend those products for which this individual will receive a commission in the individual's separate capacity as a registered representative of a broker-dealer. Consequently, this is an inherent conflict of interest. If Client has questions, Client should discuss this with Client's assigned IAR and, for additional information, review Client's assigned IAR's Form ADV Part 2B Brochure Supplement and the firm's Form ADV Part 3, Relationship Summary, for additional information about Client's IAR and this separate capacity as a registered representative of a broker-dealer.

- b. Insurance Agent. In a capacity separate from IPW, the individuals serving as IARs of IPW may also be state licensed as insurance agents. Client is not obligated in any manner to purchase insurance or annuity products through such individual. If Client elects to purchase an insurance or annuity product through such individual in his or her separate capacity as an insurance agent, this individual will receive a commission, which will vary depending upon the particular product recommended. As a result, this is an inherent conflict of interest, and the objectivity of the advice rendered to Client is biased. Client is under no obligation to use such IAR as Client's insurance agent. If Client has questions, Client should discuss this with Client's assigned IAR and, for additional information, review Client's assigned IAR's Form ADV Part 2B Brochure Supplement for additional information about Client's IAR and this separate capacity as an insurance agent.
- c. Insurance Company/IMO. Certain insurance companies may offer IPW's IARs, acting in their separate capacity as insurance agents, additional incentive compensation such as trips for meeting a sales goal associated with the insurance agent's overall sale of a particular annuity or insurance product offered by that insurance company. Certain of IPW's IARs, when acting in their separate capacity as insurance agents, may utilize a third-party insurance marketing organization ("IMO"), which IMO may or may not be affiliated with IPW. The IMO may share with an insurance agent a portion of the overrides that the IMO receives from the insurance company for the IMO's wholesaling activities associated with the sale of an annuity or insurance product. The IMO may also offer special incentive compensation, such as trips, to IPW IARs, acting in their separate capacity as an insurance agent, if they meet certain overall sales goals by placing annuities and/or other insurance products through the IMO. The IAR's receipt of these various forms of compensation for recommending particular annuity or insurance products to advisory clients is an inherent conflict of interest. Client should be aware that the receipt of additional incentive compensation itself creates a conflict of interest and will affect the independent judgment of IPW IARs when making recommendations about annuities and insurance products in general or a particular annuity or insurance product offered by a certain insurance company or through an IMO.
- d. IRA Rollover. When an IAR recommends that Client rollover his or her account from a current retirement plan to an IRA, this creates a conflict of interest. IPW and its IARs can earn investment advisory fees by recommending that Client rollover his or her account at the retirement plan to an IRA; however, IPW and its IARs will not earn any investment advisory fee if Client does not rollover the funds in the retirement plan (unless Client retained IPW to provide advice about Client's retirement plan account). Thus, IPW and its IARs have an economic incentive to recommend a rollover of the retirement plan account, which is an inherent conflict of interest and the objectivity of the advice rendered to Client is biased. IPW has taken steps to manage this conflict of interest arising from rolling over funds from an ERISA covered retirement plan to an IRA and has adopted written policies and procedures whereby IPW and its IARs will disclose the advantages/disadvantages of the retirement plan/IRA rollover options available to Client and will only recommend rollover if in the best interest of Client.
- e. Loans/Transition Bonuses. As an incentive for IPW IARs to use IPW programs and services, IPW may provide transition bonuses and/or forgivable loans and similar economic incentives. Forgivable Loans and/or transition bonuses are provided in order to assist IPW IARs with for example, transitioning Client from IAR's former service provider(s) to IPW. The receipt of a loan and/or transition bonus from IPW is an inherent conflict of interest in that the IAR has a financial incentive to maintain the relationship with IPW.

20. PROXY VOTING

IPW does not vote proxies on behalf of Client. Client is instructed to read through the information provided with the proxy-voting documents and make a determination based on the information provided. If requested, IPW may provide limited clarifications of the issues presented in the proxy voting materials based on IPW's understanding of issues presented in the proxy-voting materials. However, Client will have the ultimate responsibility for making and voting all proxy-voting decisions.

21. CLASS ACTIONS, BANKRUPTCIES, AND OTHER LEGAL PROCEEDINGS

IPW will not advise or act on behalf of Client in legal proceedings involving companies whose securities are held or previously were held in Client's Account(s), including, but not limited to, the filing of "Proofs of Claim" or similar filings in bankruptcies and class action settlements.

22. CLIENT CONFLICTS

If this Agreement is between IPW and related or joint Clients (e.g. husband and wife, life partners, etc.), IPW's services will be based upon the joint goals communicated by Client to IPW. IPW will be permitted to rely upon instructions from either party, who has signed this Agreement as a Client, with respect to any aspect of the Account, unless and until such reliance is revoked in writing from Client to IPW. IPW will not be responsible for any claims or damages resulting from such reliance or from any change in the status of the relationship between related or joint Clients.

23. CLIENT DEATH OR DISABILITY

Client's death, disability, or incompetency will not automatically terminate or change the terms of this Agreement. However, Client's executor, guardian, attorney-in-fact, or other authorized representative may terminate this Agreement in accordance with Section 23.

24. TERM AND TERMINATION

- a. Term. The term of this Agreement shall begin on the date it is fully executed by Client and IPW and shall continue until it is terminated by either party in accordance with this Section.
- b. Termination by written notice. This agreement may be terminated by IPW, on the one hand, or Client, on the other hand, by providing written notice of termination of the Agreement to the other party, pursuant to Section 29.
- c. Automatic Termination. The Agreement will terminate automatically upon the occurrence of any of the following:
 - i. Client transfers all assets in Client's Accounts away from IPW;
 - ii. Client closes all of Client's Accounts to which this Agreement applies; or
 - iii. Client removes either IPW or IAR from all of Client's Accounts to which this Agreement applies.
- d. Termination because of termination or resignation of IAR.
 - i. When IAR is terminated or resigns from IPW, and IPW does not appoint a different IAR to provide services, this Agreement will terminate 45 days after the date of the IAR's termination or resignation. A termination notice will be sent to Client. Client may terminate this Agreement prior to the expiration of 45 days by providing written notice of termination to IPW, pursuant to Section 29.
 - ii. During this 45-day period (or shorter period if this Agreement is terminated by Client prior to the expiration of 45 days):
 - A. All assets in a Managed Model will be "de-sleeved" meaning the assets will no longer be managed by IPW. De-sleeved assets, formerly in a Managed Model, will not be rebalanced.
 - B. IPW will not review suitability and risk tolerance or provide individualized investment advice to Client with respect to the Account.
 - C. IPW will terminate all investment advisory fee billing on the Account from the IAR's effective date of termination or resignation. Client's Account custodian will continue to charge applicable fees to Client's Account, pursuant to Client's agreement with the custodian.
 - D. IPW will restrict trading authority on the Account so that only trade orders received from Client are transacted. Client is solely responsible for directing all transactions on the Account. Client is solely responsible for monitoring Account.
 - E. If Client desires to direct a transaction in the Account, Client may contact IPW by phone and IPW will administer requested trade in accordance with Client's instruction.
 - F. If a Third-Party Manager provides direct asset management services to Client's Account through IPW, such services may continue unless or until Client terminates Client's investment management agreement with the Third-Party Manager.

- iii. Upon expiration of the 45-day period (or shorter period if this Agreement is terminated by Client prior to 45 days), IPW will instruct the custodian to convert Client's Account to a self-directed account and remove IPW from all authority over the Account.
- e. Effect of Termination.
 - i. Termination of this Agreement will not affect (i) the validity of any action previously taken by IPW under this Agreement; (ii) liabilities or obligations of the parties from transactions initiated before termination of this Agreement; (iii) custodial fees that are applicable to the Account, or (iv) Client's obligation to pay the investment advisory fees (prorated through the date of termination).
 - ii. Upon the termination of this Agreement, IPW, other service provider(s), Strategists, and Third-Party Managers, with whom Client has no separate agreement for services, will have no obligation to recommend or take any action regarding the securities, cash, or other investments in the Account.
 - iii. Upon the termination of this Agreement, if Client has entered into a separate investment management agreement with a Third-Party Manager for services, such services and fees of the Third-Party Manager may continue unless or until Client terminates Client's investment management agreement with the Third-Party Manager.

25. CONFIDENTIALITY

IPW will treat all non-public information about Client as confidential. Except as otherwise agreed or required by law, IPW will exercise diligence and care with respect to keeping Client's information confidential. Any disclosure by IPW to third parties of non-public information provided by Client will be made in accordance with applicable law and the privacy policies of IPW as may be amended from time to time, or consistent with any written instruction from Client. Client authorizes IPW to provide a copy of this Agreement to a custodian or other party to a transaction for Client's Account as evidence of IPW authority to act on Client's behalf. In addition, Client grants IPW authority to discuss, disclose, and provide Client's confidential information to outside service providers, attorneys, auditors, consultants, and any other professional advisors retained by IPW to assist in the management of Client's Account and/or services.

26. RECORDING OF COMMUNICATIONS

Client consents to IPW monitoring and/or recording and storing telephonic or electronic voice communications IPW has with Client for recordkeeping, security, and quality of service purposes, without further notice, and agrees that IPW may produce such recordings and related records as evidence in any proceedings brought in connection with this Agreement.

27. HOUSEHOLD ACCOUNTS

- a. As a convenience to Client, IPW provides household reporting for various Accounts owned by members of Client's household. The householding process will automatically link Accounts into a household account portal when the Accounts meet all of the following criteria: 1) same mailing or legal address; 2) same advisor of record; and 3) same last name associated with each Social Security number (a "household"). Clients who desire to receive household reporting, but do not meet the criteria for automatic householding, may request to create a household. If activated, the household account portal will contain information for each Account in the household as well as a summary of all Accounts included for the household. If Client submits documentation to a custodian for Client Accounts requesting household reporting, IPW may treat such request as a request for IPW to provide household reporting. IPW will terminate household reporting promptly upon the written request of the Client or the IAR on the Client's behalf.
- b. If Client does not wish to give IPW authority to create a household account portal, Client will initial below:

_____ IPW will not provide household account information for Client's/s' Accounts.

28. TRUSTED CONTACT

- a. IPW is required to request Client provide IPW with a "Trusted Contact." If Client desires to provide IPW with a Trusted Contact, Client shall provide contact information for the Trusted Contact on Addendum II - Client Profile.
- b. Client understands by providing a Trusted Contact, Client gives permission to IPW, including Client's IAR, to use their discretion to contact the Trusted Contact and disclose information about Client and Client's Account in order

to: (1) address concerns that Client might be a victim of financial exploitation or elder abuse which could include fraud, coercion, or unauthorized transactions, (2) address a temporary hold or freeze on a disbursement of funds or securities pertaining to possible financial exploitation, elder abuse, or other concerns, (3) confirm or correct Client's current contact information, (4) confirm or address Client's whereabouts and health status, and/or (5) confirm the identity of any legal guardian, executor, trustee, holder of a power of attorney, or other individual who may be acting on Client's behalf (such as an attorney or accountant). The Trusted Contact will not be authorized to execute any transactions within Client's Account or be provided with direct access to Client's Account but may be provided information regarding Client and Client's activities.

29. ACCOUNT HOLD

Client acknowledges in a situation of suspected financial exploitation, IPW may, if warranted, place a temporary hold on disbursement of funds or securities from an Account. Once a hold or freeze has been placed on an Account, Client's custodian may have requirements that must be fulfilled before a hold or freeze can be lifted from an Account and IPW may not be able to override these requirements. Client authorizes IPW to move a Client's Account to non-managed in the event that a hold or freeze prevents or otherwise restricts IPW from managing the Account.

30. NOTICE

Any notice or other communication required or permitted to be given pursuant to this Agreement will be deemed to have been duly given when delivered in person, sent by fax or e-mail, sent by overnight courier, or three days after mailing by registered mail (postage prepaid). All notices or communications to IPW should be sent to the main address of IPW or via email to notice@IPWM.com. All notices or communications to Client will be sent to the address of record or email last provided by Client.

31. APPLICABLE LAW

This Agreement will be construed under the laws of the State of Georgia. Nothing in this Agreement will be construed contrary to the Investment Advisers Act of 1940 or any rule thereunder. In addition, to the extent not inconsistent with applicable law, the venue (i.e., location) for the resolution of any dispute or controversy between IPW and Client will be in Marietta, Georgia.

32. ENTIRE AGREEMENT

This Agreement, together with the attached and incorporated Addendums: Acknowledgement of Assigned Investment Adviser Representative, Client Profile, Account Suitability and Risk Tolerance Questionnaire, Plan and IRA Rollover Information, and Client Fee Disclosure, as such may be amended, represent the entire understanding between the parties with regard to the matters specified herein. No other agreements, covenants, representations, or warranties, express or implied, oral or written, have been made by any party to any other party concerning the subject matter of this Agreement. This Agreement may be executed in any number of counterparts and by different parties in separate counterparts. Each counterpart when so executed shall be deemed to be an original and all of which together shall constitute one and the same agreement.

33. VALIDITY

If any part of this Agreement is found to be invalid or unenforceable, it will not affect the validity or enforceability of the remainder of this Agreement. Any handwritten or other changes made to the form of this Agreement (including by Client or by any IPW agent) before or at the time this Agreement is signed by Client and IPW do not apply.

34. AMENDMENTS AND ASSIGNMENT

- a. Amendment.
 - i. This Agreement, and incorporated Addendums, may be amended by the mutual written agreement of IPW and Client.
 - ii. IPW shall have the right to amend this Agreement, and incorporated Addendums, by providing Client with written notice at least thirty (30) days prior to the effective date of the proposed amendment. This notice will

be sent in accordance with Section 29 of this Agreement and will explain the proposed amendment to the Agreement, state the scheduled effective date for the proposed amendment, and disclose Client's right to reject in writing the proposed changes and to terminate this Agreement. If Client rejects an amendment and IPW elects to terminate the Agreement, IPW will provide written notice to Client of such termination. If Client fails to provide written rejection of the amendment prior to the stated effective date, Client will be deemed to have consented to the amendment.

- b. Assignment.
 - i. This Agreement, and incorporated Addendums, may be assigned by the mutual written agreement of IPW and Client.
 - ii. IPW shall have the right to assign this Agreement, and incorporated Addendums, by providing Client with written notice at least forty-five (45) days prior to the effective date of the assignment. This notice will be sent in accordance with Section 29 of this Agreement and will explain the assignment, state the scheduled effective date for the assignment, and disclose Client's right to reject in writing the assignment and to terminate this Agreement. If Client rejects an assignment and IPW elects to terminate the Agreement, IPW will provide written notice to Client of such termination. If Client fails to provide written rejection of the assignment prior to the stated effective date, Client will be deemed to have consented to the assignment.

35. AUTHORITY

- a. IPW represents that it is authorized and empowered to enter into this Agreement and the person signing this Agreement is authorized to so act on its behalf. Client represents that he or she is authorized and empowered to enter into this Agreement. If this Agreement is being signed on behalf of a corporation, partnership, trust, or other business or legal entity, Client represents that applicable law and governing documents authorize and permit this Agreement.
- b. Client understands that: (a) IAR is an independent contractor of IPW and not an employee of IPW; and (b) all Investment Advisory Services Agreements must be accepted by an authorized person of IPW.

36. ACKNOWLEDGEMENT OF RECEIPT OF DISCLOSURE DOCUMENTS AND PRIVACY NOTICE

Client(s) acknowledge(s) receipt of the below initialed documents on _____, 20____ :

- _____ Form ADV Part 2A Brochure of IPW
- _____ Form ADV Part 2A-Appendix 1 Wrap Fee Disclosure Brochure of IPW
- _____ Form ADV Part 3 of IPW – Relationship Summary
- _____ Privacy Notice of IPW
- _____ Form ADV Part 2B Brochure Supplement for assigned IAR of IPW
- _____ Form ADV Part 2A Brochure or Wrap Fee Disclosure Brochure of Strategist or Third-Party Manager (if applicable)
- _____ Privacy Notice of Strategist or Third-Party Manager (if applicable)

37. ELECTRONIC DELIVERY

Client authorizes IPW to deliver, and Client agrees to accept, all required regulatory notices and disclosures, as well as all other reports and correspondence from IPW, via electronic mail. Information and documents provided by IPW will include,

but are not necessarily limited to, Form ADV updates and offers, Account reports prepared by IPW, IPW's annual Privacy Notices, disclosures required under Section 408(b)(2) of ERISA, and other written communications from IPW. IPW may receive, via electronic means, Client's consent to assignment or amendment of this Agreement. When using electronic delivery, IPW will have completed all delivery requirements upon the forwarding of such document, disclosure, notice and/or correspondence to Client's last provided email address. Client may notify IPW in the event Client does not want electronic delivery of information. Client has the right to withdraw its consent to electronic delivery without the imposition of any fee or condition. Client's consent to electronic delivery regarding IPW notices, disclosures and other information does not impact electronic delivery policies of third-party service providers including, but not limited to, Account custodian.

38. ARBITRATION

- a. To the extent permitted by the laws where Client resides, any controversy or dispute which may arise between Client and IPW concerning any transaction or the construction, performance or alleged breach of this Agreement will be settled by arbitration. Any arbitration will be pursuant to the rules, then applying, of the American Arbitration Association, except to the extent set forth herein. The arbitration panel will consist of at least three individuals, with at least one panelist having knowledge of the investment advisory business and regulatory obligations. The parties agree that any arbitration proceeding pursuant to this provision will be held in a location as determined by the rules of the American Arbitration Association. The award of the arbitrators will be final and binding on the parties, and judgment upon the award rendered may be entered into in any court, state or federal, having jurisdiction. Client notes the following provisions of arbitration:
 - i. Arbitration is final and binding on all parties.
 - ii. The parties are waiving their right to seek remedies in court, including the right to jury trial, except to the extent such a waiver would violate applicable law.
 - iii. Pre-arbitration discovery is generally more limited than and different from court proceedings.
 - iv. The arbitrators' award is not required to include factual findings or legal reasoning and any party's right to appeal or to seek modification of rulings by the arbitrators is strictly limited.
 - v. The panel of arbitrators will typically include a minority of arbitrators who were or are affiliated with the securities industry.
 - vi. The decision and award of the arbitration panel shall include an order that the non-prevailing party pay all fees, costs, and expenses, including reasonable attorney's fees, incurred by the prevailing party in relation to the arbitration.
- b. The agreement to arbitrate does not entitle Client to obtain arbitration of claims that would be barred by the relevant statute of limitations if such claims were brought in a court of competent jurisdiction. If at the time a demand for arbitration is made or an election or notice of intention to arbitrate is served, the claims sought to be arbitrated would have been barred by the relevant statute of limitations or other time bar, any party to this agreement may assert the limitations as a bar to the arbitration by filing an action in any court of competent jurisdiction, and Client expressly agrees that such court may fully determine any issues relating to the application of a statute of limitations or other time bar. The failure to assert such bar by application to a court, however, will not preclude its assertion before the arbitrators. Client understands that this agreement to arbitrate does not constitute a waiver of the right to seek a judicial forum where such waiver would be void under the state and/or federal securities laws.

This Agreement contains a Pre-Dispute Arbitration clause that each party has read, understood, and hereby accepts as witnessed by the signature below.

[Signature page follows]

IN WITNESS WHEREOF, this Agreement has been executed by the parties and is effective as of the date of execution by IAR on behalf of Impact Partnership Wealth, LLC.

If more than one, all principals to the Account must sign. If any signatory is a fiduciary, the capacity in which he or she is acting should be indicated.

Accepted by First Account Owner:		Accepted by Second Account Owner (if applicable):	
Client's Signature	Date	Client's Signature	Date
Client's Printed Name		Client's Printed Name	
Capacity Signing As (If applicable)		Capacity Signing As (If applicable)	
Client's email address		Client's email address	

ACCEPTED BY IAR ON BEHALF OF Impact Partnership Wealth, LLC	
By:	
IAR's Signature	Date
IAR's Printed Name	



IMPACT PARTNERSHIP WEALTH
 1688 WHITE CIRCLE NW
 MARIETTA, GA 30066
 800.380.5040

Addendum II Client Profile

Primary Account Owner																				
Account Owner/Entity Name				Date of Birth				Social Security Number/Tax ID												
Marital Status: Married			Unmarried			Domestic Partner			Citizenship: US Citizen			Permanent Resident		Not a US Citizen						
Relationship of Account Owners (if applicable)						Country of Citizenship (Only if not US Citizen)				Country of Birth (Only if not US Citizen)										
Occupation						Anticipated Retirement Date														
Legal Address (No PO Boxes)				City				State		Zip										
Mailing Address (if applicable)				City				State		Zip										
Contact Phone			Email Address			Trusted Contact (Provide Name, Phone Number, Email)														
For each investment category, check the box that represents the investor's level of knowledge. (1 represents little knowledge and 5 represents highly knowledgeable)																				
Stocks:		1	2	3	4	5	Options:		1	2	3	4	5	Mutual Funds:		1	2	3	4	5
Bonds:		1	2	3	4	5	Variable Contracts:		1	2	3	4	5	LLPs/LLCs:		1	2	3	4	5
General Investment Experience:			None			Limited			Good			Extensive								
Annual Household Income from all sources:				Estimated Net Worth (excluding primary residence):				Liquid Net Worth (cash, stocks, bonds, etc.)												
Federal Income Tax Bracket:			15% or below			16% - 28%			29% - 35%			Over 35%								
Second Account Owner (if applicable)																				
Account Owner/Authorized Party Name				Date of Birth				Social Security Number												
Marital Status: Married			Unmarried			Domestic Partner			Citizenship: US Citizen			Permanent Resident		Not a US Citizen						
Relationship of Account Owners (if applicable)						Country of Citizenship (Only if not US Citizen)				Country of Birth (Only if not US Citizen)										
Occupation						Anticipated Retirement Date														
Address same as Primary Owner																				
Legal Address (No PO Boxes)				City				State		Zip										
Mailing Address (if applicable)				City				State		Zip										
Contact Phone			Email Address			Trusted Contact (Provide Name, Phone Number, Email)														
For each investment category, check the box that represents the investor's level of knowledge. (1 represents little knowledge and 5 represents highly knowledgeable)																				
Stocks:		1	2	3	4	5	Options:		1	2	3	4	5	Mutual Funds:		1	2	3	4	5
Bonds:		1	2	3	4	5	Variable Contracts:		1	2	3	4	5	LLPs/LLCs:		1	2	3	4	5
General Investment Experience:			None			Limited			Good			Extensive								
Income and Tax Info same as Primary Owner																				
Annual Household Income from all sources:				Estimated Net Worth (excluding primary residence):				Liquid Net Worth (cash, stocks, bonds, etc.)												
Federal Income Tax Bracket:			15% or below			16% - 28%			29% - 35%			Over 35%								
Signatures																				
Client Signature				Date				Client Signature				Date								



IMPACT PARTNERSHIP WEALTH
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Addendum III- Account Suitability and Risk Tolerance Questionnaire

Account Information						
Account Holder(s)/Entity Name			Account Number(s) (if available)			
Registration Type(s) (Select all account types this suitability applies to):						
Individual	Joint	Trust (Living/Revocable/ Irrevocable)	Traditional IRA	Roth IRA	SEP IRA	Simple IRA
Corporate Account	Estate	UTMA/UGMA State of Est.	Rollover IRA	Other		
Primary Objective:		Preservation of Capital	Income	Growth and Income	Capital Appreciation	Aggressive Growth
Risk Tolerance:		Conservative	Moderately Conservative	Moderate	Moderately Aggressive	Aggressive
Investment Time Horizon:		1-5 years	5-10 years	10-15 years	> 16 years	
All reasonable restrictions, including special instructions and limitations, regarding the investments and management of Client's Account or other relevant information regarding the needs and circumstances of the Account Owner(s) are noted as follows:						
Account Information						
Account Holder(s)/Entity Name			Account Number(s) (if available)			
Registration Type(s) (Select all account types this suitability applies to):						
Individual	Joint	Trust (Living/Revocable/ Irrevocable)	Traditional IRA	Roth IRA	SEP IRA	Simple IRA
Corporate Account	Estate	UTMA/UGMA State of Est.	Rollover IRA	Other		
Primary Objective:		Preservation of Capital	Income	Growth and Income	Capital Appreciation	Aggressive Growth
Risk Tolerance:		Conservative	Moderately Conservative	Moderate	Moderately Aggressive	Aggressive
Investment Time Horizon:		1-5 years	5-10 years	10-15 years	> 16 years	
All reasonable restrictions, including special instructions and limitations, regarding the investments and management of Client's Account or other relevant information regarding the needs and circumstances of the Account Owner(s) are noted as follows:						
Account Information						
Account Holder(s)/Entity Name			Account Number(s) (if available)			
Registration Type(s) (Select all account types this suitability applies to):						
Individual	Joint	Trust (Living/Revocable/ Irrevocable)	Traditional IRA	Roth IRA	SEP IRA	Simple IRA
Corporate Account	Estate	UTMA/UGMA State of Est.	Rollover IRA	Other		
Primary Objective:		Preservation of Capital	Income	Growth and Income	Capital Appreciation	Aggressive Growth
Risk Tolerance:		Conservative	Moderately Conservative	Moderate	Moderately Aggressive	Aggressive
Investment Time Horizon:		1-5 years	5-10 years	10-15 years	> 16 years	
All reasonable restrictions, including special instructions and limitations, regarding the investments and management of Client's Account or other relevant information regarding the needs and circumstances of the Account Owner(s) are noted as follows:						
Signatures						
By signing below, I acknowledge the information provided here, as well as what is reflected on the Client Profile, is true and accurate.						
Client Signature		Date	Client Signature		Date	
Advisor Signature			Date			



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Addendum IV Plan and IRA Rollover Information

1. Account Information			
Client Name:	Receiving Account Name:	Investment Adviser Representative:	
Receiving Account Type:	<input type="checkbox"/> Brokerage Account <input type="checkbox"/> Annuity <input type="checkbox"/> Other		
Approximate Rollover/Transfer Amount:	Receiving Account # (if available):		
2. Employer Plan/IRA Information (Complete 2A for Employer Plan OR 2B for Current IRA Section)			
A. Employer Plan (401(k), 403(b), SEP, SIMPLE, etc)			
Plan Sponsor/Employer:	Plan Name:		
Employment Status:	<input type="checkbox"/> Employed by Current Plan Sponsor/Employer <input type="checkbox"/> Not Employed <input type="checkbox"/> Retired		
	<input type="checkbox"/> Employed by New Employer with New Plan Immediately Available <input type="checkbox"/> Employed by New Employer with No Plan Immediately Available		
If separating from employer, will there be a need for immediate access to these funds?		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
B. Current IRA (Traditional, Roth, Beneficiary IRA, etc.)			
Name of Financial Institution:	Registration Type:	Account Number:	
3. Plan/IRA Fees & Charges			
Understanding and evaluating plan/IRA fees and expenses associated with plan investments, investment options, and services is important to make informed decisions. Reflected below as % and/or \$ amount. Enter "0" or N/A if none.			
Select and complete all that apply:	Current Plan/IRA	Proposed IRA	
Mutual Funds/ETFs: <i>(i.e. Underlying Average Expense)</i>	% \$	% \$	
Plan Administration/Custodial Fees: <i>(i.e. Annual Account Fee)</i>	% \$	% \$	
Commissions/Sales Charges: <i>(i.e. Transaction Fees)</i>	% \$	% \$	
Investment Advisory Fees: <i>(i.e. Annual Advisory Fee)</i>	% \$	% \$	
Insurance Related Expenses: <i>(i.e. M&E Expense)</i>	% \$	% \$	
Other Account Fees: <i>(i.e. Loan Fees)</i>	% \$	% \$	
Will any other account administrative fees be incurred at the time of the rollover transfer? (ACAT, account termination fee, etc.)?	No	Yes- please provide % or \$	
Explain Sources of Fees/Cost Info			
For all fee information presented please explain the steps taken to obtain and the sources of information provided.			
<input type="checkbox"/> Client Account Statement <input type="checkbox"/> Plan Sponsor <input type="checkbox"/> Plan Documents <input type="checkbox"/> 3 rd Party Website:			
<input type="checkbox"/> Client Provided <input type="checkbox"/> 3 rd Party Vendor Application:	Other:		
Explain Proposed Investment Changes			
Describe the factors/product features that led to the determination that the transactions described above are in the best interest of the client. Include in the description the specific advantages and disadvantages of each product sold/surrendered/redeemed/exchanged and each newly acquired product. The description must conclude with an evaluation of the overall net advantage to the client for pursuing the recommended transactions described above.			

Explain Proposed Investment Changes *(continued)*

Client Options *(All options may not be available.)*
Leave the account at the current firm or with the current or former employer-sponsored plan. Benefits of leaving money in an employer-sponsored plan may include access to lower-cost mutual fund share classes, which may be unavailable outside the plan; access to investment planning tools and other educational materials from the plan sponsor; access to loans; the potential for penalty-free withdrawals starting at age 55; broader protection from creditors and legal judgments; and the ability to postpone required minimum distributions beyond age 72, under certain circumstances.

- Roll the account over to a new employer's 401(k).
- Roll over or transfer the account to a brokerage IRA (self-directed).
- Roll over or transfer the account to an advisory IRA.
- Cash out. *(Client should consult a tax professional for possible tax implications.)*

4. Retirement Plan and IRA Details

Indicate the reason(s) for accepting a recommendation to rollover assets from the employer-sponsored retirement plan or IRA. Select any that apply.

Client prefers to work with an investment adviser representative for professional and individualized advice and management.

Client wants flexibility to invest in products that are not available under their current plan or individual retirement account.

Client would like additional distribution frequency and income options not currently available.

Client is dissatisfied with limited range of investment options in their current plan or individual retirement account.

Client seeks ongoing advice not available with current plan or individual retirement account.

Client does not want the assets to be held in their former employer plan account(s).

Client's former employer is cancelling the plan or requiring assets to be transferred out of the plan.

Client would like to have access to planning services that would enable the Investment Adviser Representative to make allocations across multiple accounts.

Other

5. Client Acknowledges the following: *(Please Initial All)*

_____ Client acknowledges that the Client Options above have been discussed with investment adviser representative and Client has considered the options, fees and expenses, services available, cost of withdrawals including tax consequences, protection of assets from creditors, rules regarding required distributions and treatment of employer stock in making a decision to rollover assets from Client's employer-sponsored plan or Individual Retirement Account.

_____ Client acknowledges that a description of Impact Partnership Wealth's services and conflicts of interest can be found in Impact Partnership Wealth's ADV 2A.

_____ Client acknowledges that when we provide investment advice to you regarding your retirement plan account or individual retirement account, we are fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. The way we make money creates some conflicts with your interests, so we operate under a special rule that requires us to act in your best interest and not put our interest ahead of yours.

6. Signatures

Client Signature	Date	Investment Adviser Representative Signature	Date
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IMPACT PARTNERSHIP WEALTH
 1688 WHITE CIRCLE NW
 MARIETTA, GA 30066
 800.380.5040

Addendum V Client Fee Disclosure

This Client Fee Disclosure sets forth the investment advisory fee for asset management services described in an Asset Management Agreement executed by the undersigned Client.

Unless otherwise specified in the schedule below, the fee for all household accounts will be:	(Required)
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Fees are based on assets under management, and you will not pay a separate commission or ticket charge to the custodian for the execution of transactions in your account. Other custodial fees may apply. Please see the links below to refer to your custodian’s fee schedule. IPW and certain service providers, including (if applicable) the platform provider, the custodian, and model portfolio manager will receive a portion of the fee as compensation for services.

FOR ANY SPECIFIC MODEL/SLEEVE/ACCOUNT FEES, PLEASE DESIGNATE BELOW:

Description (Management style, model manager, investment manager, etc.)	Total Advisory Fee

IPW charges a \$30.00 annual administrative fee, billed in monthly increments based on the number of days in the month, for Reporting Only, Alternatives, and Client Directed Accounts.

Your custodian may charge fees in other situations that are not addressed in this Addendum including, but not limited to, fees for account opening and closing and transaction-based fees for certain non-traded securities or alternative investments including, but not limited to, Real Estate Investment Trusts and Business Development Companies. All your custodian’s maximum fees are set forth in a fee schedule and are subject to change by the custodian. However, some fees may be lower if IPW has negotiated more favorable fees for services with the custodian.

Accepted by First Account Owner	Accepted by Second Account Owner (if applicable):
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Client Signature	Date	Client Signature	Date
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Client’s Printed Name	Client’s Printed Name
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