

RHF

Robert Hunt Financial

Robert Hunt Financial, LLC Client Service Agreement

This Client Service Agreement (CSA) sets forth the understanding between you (“client” or “you”), and Robert Hunt Financial, LLC (“RHF” or “adviser), a financial advisory firm located in Dallas, Texas. The terms of this CSA govern all services provided by RHF to you unless you and RHF enter into a separate agreement. By signing the CSA, you affirm that you have read and understood its provisions.

1. Initial Onboarding Consultation

RHF will provide an initial consultation to you after the CSA is signed with the requested membership level marked. At the initial consultation, you will provide RHF with information related to your financial assets and personal financial goals, RHF will address applicable planning issues raised by your unique circumstances, and you and RHF may agree to the scope of services RHF will provide you in the future.

2. Specific planning areas addressed:

RHF will provide you with analysis and recommendations regarding how to achieve your financial goals. RHF may deliver its analysis and recommendations to you in writing or orally, in person, via phone or via electronic communication. RHF will limit the scope of its recommendations to the following:

- Asset allocation
- Investment selection
- General financial planning
- Financial and investment education

You understand and agree that your failure to provide relevant information to RHF may have a detrimental impact on the suitability or effectiveness of specific recommendations given.

3. Future Services

RHF may periodically amend this CSA, and if so, the terms of this CSA, as amended, will govern such additional services. You may request to see a copy of the amended CSA at any time. The terms of this CSA that are in effect at the time RHF renders services to you shall apply to those services. This CSA may be amended as to its provisions regarding payment of fees as well as regarding limitations on RHF's duties and liabilities.

4. Membership Levels

All Annual Fees and One Time Setup fees are due 14 days after the CSA has been signed.

Basic Membership: Entry level membership that is a pay as you go service and includes RHF Insights access.

One Time Setup Fee: \$ 0

Annual Fee: \$ 0

Hourly Rate: \$ 450

Select Membership: Middle tier service level that includes preferred hourly rate, an initial intake meeting, an annual review meeting, RHF Insights access and priority service.

One Time Setup Fee: \$ 299

Annual Fee: \$ 199

Hourly Rate: \$ 150

Private Client Membership: Highest service level that includes preferred hourly rate if additional hours desired, initial intake meeting, quarterly review meetings, RHF Insights access and the highest priority service.

One Time Setup Fee: \$ 699

Annual Fee: \$ 599

Hourly Rate: \$ 150

5. Client representations

You represent to RHF the following, and you understand and agree that RHF is relying on these representations as an inducement to enter into this CSA:

- You acknowledge and accept the risk that financial or personal perils may occur between the commencement of the planning engagement and the time at which topical advice and recommendations are delivered.

Examples of such perils include but are not limited to: financial market decline or crash, death, disability, or incapacity of client, spouse, or children, or job loss.

RHF bears no responsibility for client financial loss(es) related to financial areas that have not yet been analyzed, communicated, or recently reviewed at the time of such loss(es).

- You agree that you will provide RHF with the necessary information to provide the agreed upon services in a timely fashion.
- You understand that RHF obtains information from a wide variety of publicly available sources and cannot guarantee the accuracy of the information or success of the advice that may be provided. The information and recommendations developed by RHF are based on the professional judgment of RHF and the information you provide to RHF.
- You understand that all investments involve risks and that some investment decisions will result in losses. You understand that RHF cannot guarantee that your investment objectives will be achieved.
- Nothing in this CSA shall in any way limit or waive any rights you may have under federal or state securities laws.
- You understand that RHF does not provide legal or accounting advice and does not prepare any legal documents for the implementation of any recommendations provided in the financial plan.
- You understand that the responsibility for financial decisions is yours and that you are under no obligation to follow, either wholly or in part, any recommendation or suggestion provided by the adviser.

- You understand and agree that due to the limited nature of this engagement, RHF is under no obligation to contact you to recommend changes to your financial plan or any of the recommendations and advice provided under this CSA in the future.
- You understand that failure to implement all or part of the recommendations in the financial plan will have an impact upon the results you achieve.
- You understand that there are substantial risks involved in investing in securities. It is your responsibility to read the recommended securities' prospectuses before investing. Prospectuses are available online through the issuing fund company, administration or trustee, or brokerage firm. Upon request, RHF will provide a direct link to the prospectuses of the recommended securities.
- You acknowledge that there are complexities and risks associated with trading securities including, but not limited to, execution or trading errors, price volatility, bid/ask spreads, order types (such as "market" and "limit" orders), deviation from net asset value, and "execution price slippage" caused by lack of order book depth.
- You agree to enlist the assistance of your investment custodian firm when placing trades if you are not experienced or comfortable with the above-noted complexities and risks. RHF will provide investment recommendations in the form of open-end mutual funds or exchange traded funds (ETFs).
- You agree that RHF bears no liability or responsibility for improper execution of recommendations.
- You understand that investing in securities involves risk of loss that you should be prepared to bear.

6. Electronic communications

You consent to receive correspondence from RHF via electronic mail including attachments in Adobe Acrobat (pdf) format. Communications include but are not limited to: written recommendations, fee quote or invoices, offer of and changes to RHF's disclosure brochure, fee change notices, and requests for additional information for project completion.

It is your responsibility to provide RHF with an updated e-mail address and to inform RHF of any change of such address. You also agree to regularly read e-mail delivered to

said address and to maintain a system that allows retrieval of communications from internet websites. RHF assumes no liability for electronic communications that are not read or acknowledged by you.

RHF agrees to make prudent efforts to protect confidential client-identifying information (limited to Social Security number, account numbers, dates of birth, and specific health conditions) in electronic communications.

7. Termination

This CSA automatically terminates upon the death or incapacity of Robert Hunt. If Robert Hunt's death or incapacity occurs prior to delivery of recommendations, you will receive no invoice for services rendered or will receive a full refund if you have already paid. If Robert Hunt's death or incapacity occurs after delivery of recommendations, no refund will be paid.

Investment advisers are free to provide a time period longer than five business days for penalty-free termination by their clients. If the client chooses to terminate the contract within the five business day period, the adviser can only charge for fees incurred prior to the termination excluding administrative fees, account set-up fees, and minimum quarterly fees.

8. Implementation of investments

RHF will not implement any investment recommendations on your behalf. RHF will not have power of attorney or trading authority over your accounts. RHF will not have authority or permission to debit fees from your investment accounts.

RHF may recommend a brokerage firm based on its trading and technology platform, its depth and breadth of services, its customer service responsiveness, and its transaction costs to clients. You are free to execute RHF's recommendations at the custodian of your choosing.

RHF receives no compensation from brokerage firms in exchange for directing any client's assets. Consistent with RHF's lack of trading authority, RHF does not provide "continuous and ongoing management and supervision" of your accounts. Any ongoing review and advice shall be either at your request or conducted periodically, if you and RHF have agreed to such periodic review.

9. Multiple clients

In the event that a client is more than one individual (as in the case of married couples or if multiple parties have signed this CSA), RHF is authorized to communicate with either party. All communications delivered by an adviser to one party are assumed relayed to all client parties. Married couples are considered one "joint client" even if only one spouse signs this CSA.

10. Commissions

You understand that RHF will not receive commissions on transactions that may result from the implementation of your financial plan.

11. Registration

Any reference to the Investment Advisers Act of 1940 is not meant to imply registration with the Securities and Exchange Commission.

12. Assignment

RHF will not assign this agreement to any other party without your written consent.

13. Disputes/mediation

If a dispute arises which is in any way related to this CSA or any other agreement between the parties, and the dispute cannot be resolved by negotiation, the parties agree to try in good faith to resolve the dispute in a mediation forum to which the parties may agree, before resorting to litigation or arbitration. Any mediation shall be conducted in the Dallas/Fort Worth area.

14. Other services

You acknowledge that RHF does not and will not practice law or accounting in providing advice to you or in preparing the plan or when recommending investment transactions. You understand that none of the fees paid under this agreement relate to accounting or legal services and that it is your responsibility to obtain accounting or legal advice if necessary.

15. Governing law

This agreement shall be governed by the laws of the State of Texas.

16. Acknowledgement of Disclosure Statement and Privacy Statement

Client acknowledges receipt of Part 2 of Form ADV; a disclosure statement containing the equivalent information; or a disclosure statement containing at least the information required by Part 2A Appendix 1 of Form ADV, if the client is entering into a wrap fee program sponsored by the investment adviser. If the appropriate disclosure statement was not delivered to the client at least 48 hours prior to the client entering into any written or oral advisory contract with this investment adviser, then the client has the right to terminate the contract without penalty within five business days after entering into the contract. For the purposes of this provision, a contract is considered entered into when all parties to the contract have signed the contract, or , in the case of an oral contract, otherwise signified their acceptance, any other provision of this contract notwithstanding.`

Check the preferred membership level:

- Basic: \$ 0 One Time Setup fee - \$ 0 Annual Fee - \$ 450 per hour
- Select: \$ 299 One Time Setup fee - \$ 199 Annual Fee - \$ 150 per hour
- Private Client: \$ 699 One Time Setup fee - \$ 599 Annual Fee - \$ 150 Per hour

RHF and client both acknowledge that this CSA supersedes any previous agreement in existence between the two parties or their predecessor organizations.

This CSA is considered valid and legally binding by both parties upon client's acceptance of its terms, as evidenced either orally or by client's signature below:

Client Signature: _____

Printed Name: _____

Date: _____

RHF Signature: _____ Date: _____