



# INSPIRE ADVISORS

---

## FINANCIAL PLANNING AGREEMENT

Version Date: 05/18/2021

The undersigned ("Client"), being duly authorized, has established a Relationship referred to above (the "Relationship"), and hereby agrees to engage Inspire Advisors, LLC ("INSPIRE") on the following terms and conditions.

**I. *Appointment of Inspire Advisors, LLC***

Client hereby appoints Inspire as investment adviser/financial planner for this Relationship.

**II. *Services by INSPIRE.***

By execution of this Agreement, INSPIRE hereby accepts the appointment as investment adviser for the Relationship and agrees from and after the effective date, as referred to in the Schedule of Fees attached hereto as Exhibit I, to create a financial plan for Client, which will outline Client's risks and tolerance levels. It is understood and agreed that INSPIRE, in the maintenance of records for its own purposes, or in making such records or the information contained therein available to Client or any other person at the direction of Client, does not assume responsibility for the accuracy of information furnished by Client or any other person, firm or corporation.

**III. *Fees.***

The compensation of INSPIRE for its services rendered hereunder shall be calculated in accordance with the Schedule of Fees attached hereto as Exhibit I. By signing this agreement, Client authorizes INSPIRE to withdraw fees from the related investment account per the fee schedule in Exhibit I.

**IV. *Representations by Client.***

The execution and delivery of this Agreement by Client shall constitute the representations by Client that the terms hereof do not violate any obligation by which Client is bound, whether arising by contract, operation of law or otherwise. INSPIRE will not be responsible for any liability or expense resulting from a breach of Client's representations.

**V. *Representations by INSPIRE.***

By execution of this Agreement, INSPIRE represents and confirms that it is registered as an investment adviser pursuant to applicable laws and regulations.

**VI. *Amendment; Termination.***

This Agreement contains the entire agreement between the parties and may not be modified or amended except in writing as executed by both parties.

Client may terminate the Agreement within five (5) business days of signing, without penalty, and with full refund of the advisor's fees. This Agreement shall continue in effect until the earlier of (i) INSPIRE's delivery of a financial plan to Client or (ii) termination by either party by giving to the other written notice. No assignment of the Agreement by INSPIRE shall be effective without the prior written consent of Client.

**VII. *Notices.***

All notices and other communications contemplated by this Agreement shall be deemed duly given if transmitted to INSPIRE at: 3597 E Monarch Sky Ln, Ste. 330 Meridian, ID 83646 to the attention of its Chief Compliance Officer, and to Client at the address appearing below, or at such other address or addresses as shall be specified, in each case, in a written notice similarly given.

**VIII. *Governing Law.***

The validity of this Agreement and the rights and liabilities of the parties hereunder shall be determined in accordance with the laws of the state in which the client resides, except to the extent preempted by ERISA or other federal or state laws or regulations.

**IX. *Exhibits.***

The following Exhibits are attached, and are part of this Agreement:

Exhibit I - Schedule of Fees

**X. Consent to Electronic Delivery.**

Client hereby consents to receive via e-mail or other electronic delivery method for various communications, documents, and notifications from INSPIRE. These items may include but are not limited to: all statements or reports produced by INSPIRE; trade confirmations; billing invoices; all Client brochures (Form ADV, etc.); privacy policy statements; and any other notices or documentation that INSPIRE chooses to provide on an ongoing or occasional basis. Client agrees to immediately notify INSPIRE of any changes to Client's e-mail address shown below or other electronic delivery address.

**XI. Assignment.**

No assignment of the contract may be made by INSPIRE without the prior written consent of Client.

**XII. Confidential Relationship.**

All information and advice furnished by either party to the other shall be treated as confidential and shall not be disclosed to third parties except as required by law and as described in INSPIRE's Privacy Policy Statement.

**XIII. Market Conditions.**

Client acknowledges that INSPIRE's past performance and advice regarding client financial plans cannot guarantee future results. **AS WITH ALL MARKET INVESTMENTS, CLIENT INVESTMENTS CAN APPRECIATE OR DEPRECIATE.** INSPIRE does not guarantee or warranty that services offered will result in profit.

IN WITNESS THEREOF, the parties have executed this Agreement on the date stated below. Client acknowledges receipt of Parts 2A and 2B of Form ADV and INSPIRE's Privacy Policy Statement. Client authorizes INSPIRE to withdraw fees from the related investment account per the fee schedule in Exhibit I.

<b>Client Name:</b>		<b>Rep Name:</b>	
Client Signature	Date	Adviser/Solicitor Signature	Date
Client#2 Signature	Date	Inspire Advisors, LLC	Date

Client Street Address:					
City:		State:		Zip:	
Phone:		E-Mail(s):			

**Exhibit I**

**Fee Schedule**

The following are the fees charged by Inspire Advisors, LLC for services provided:

**Fixed Fees**

The negotiated fixed rate for creating client financial plans is between \$100 and \$100,000. The actual fee will be calculated based on the type and complexity of planning services provided, as well as the total assets and income being addressed in the financial plan. Fees are charged in arrears.

**Hourly Fees**

The negotiated hourly fee for these services is between \$100 and \$500 per hour. Fees are charged in arrears.

**Payment Plan**

**Amount:** \_\_\_\_\_

**Frequency:**

One Time

Monthly on the \_\_\_\_\_ day of each month beginning \_\_\_\_\_ (month/year)

Quarterly beginning \_\_\_\_\_ (month/year)

Annually beginning \_\_\_\_\_ (month/year)

**Payment Method**

**Check** *Please make checks payable to Inspire Advisors, LLC.*

**Investment Account** *(registration must match):*

*Custodian:* \_\_\_\_\_

*Account # to bill:* \_\_\_\_\_

**ACH** *(must submit a voided check):*

*Account number:* \_\_\_\_\_

*Routing number:* \_\_\_\_\_

**Credit card** *Please fill out the attached form.*

In offering financial planning, a conflict exists between the interests of the investment adviser and the interests of the client. The client is under no obligation to act upon the investment adviser's recommendation, and, if the client elects to act on any of the recommendations, the client is under no obligation to affect the transaction through the investment adviser. This statement is required by California Code of Regulations, 10 CCR Section 260.235.2.

Advisory Services are offered through Inspire Advisors, LLC a Registered Investment Adviser with the SEC.

**Credit Card Authorization Form**

Please complete all fields. You may cancel this authorization at any time by contacting us.  
This authorization will remain in effect until cancelled.

Credit Card Information
Card Type: <input type="checkbox"/> MasterCard <input type="checkbox"/> VISA <input type="checkbox"/> Discover <input type="checkbox"/> AMEX <input type="checkbox"/> Other: _____
Cardholder Name (as shown on card): _____
Card Number: _____
Expiration Date (mm/yy): _____ CVC: _____
Cardholder ZIP Code (from credit card billing address): _____

I, \_\_\_\_\_, authorize Inspire Advisors, LLC to charge my credit card above for agreed upon purchases. I understand that my information will be saved to file for future transactions on my account.

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date