Re: Changes To Your Management Agreement With New Legacy Financial Group

Dear Client

I am writing with great news. I have been searching for a plan that protected your financial security by implementing a continuity plan, in case I get "hit by the proverbial bus". I am writing to announce that I have implemented that plan. Over the past several months, I have built a close relationship with the ANTOLINO Wealth Advisors (ANTOLINO) team, that has a strong presence in the Midwest. They share my client-first philosophy of providing investment advice and financial planning and like me, consider their fiduciary duty to you above all else. I am not going anywhere and will continue with ANTOLINO as your primary contact. In addition to me, you will have a deeper bench of advisors and financial planners (9 CFP®'s) available to meet your needs. This transaction will close on July 1, 2026, subject to customary approvals and closing conditions. I will become an Investment Advisor Representative with ANTOLINO.

I am writing to notify you about this proposed transition and to seek your consent to assign the Investment Advisory Agreement you previously executed with New Legacy Financial Group (the "Agreement") to ANTOLINO, so that ANTOLINO will provide the same services to you under the same terms and conditions of the Agreement starting immediately upon the anticipated closing date of July 1, 2026. ANTOLINO and I have been preparing and expect this transition to be as seamless as possible. Your fees will not change. The strategy for managing your assets will not change unless you decide there needs to be a change. Your accounts and assets will remain held at Charles Schwab and you will continue to have the same access to those assets as you do now.

If you wish to consent to the continuation of your advisory relationship through ANTOLINO, no further action is required on your part. Thank you! If you have concerns or questions about the assignment, or wish to withhold your consent, please contact me as soon as possible, by email at jburkholder@newlegacyfinancial.com or phone: 330-669-2080. If you decide that you want to terminate our financial planning and investment management agreement, you must contact me so that the proper paperwork can be completed to terminate our agreement. Unless you contact me in writing at least 30 days from the date above to terminate your Agreement, you will be considered to have consented to the assignment of your advisory relationship to ANTOLINO and will continue without interruption starting on the anticipated closing date of July 1, 2026.

I look forward to continuing to serve and provide you with wealth management services along with my new teammates. Please reach out with any questions.

Sincerely,

Jason D. Burkholder, CFP®, CFA