

Bolmgren RetirePLAN, Inc.
FINANCIAL PLANNING AGREEMENT

Name: _____

Address: _____

City, State Zip: _____

Version Date: 01/1/2018

FINANCIAL PLANNING SESSION AGREEMENT

By this agreement, You agree to hire Bolmgren RetirePLAN, Inc. (hereto; BRP) to provide financial advisory services to You on the following terms:

Section 1. Service & Retainer. Advisor will provide ONGOING financial advice on an Hourly basis. No specific outcome is guaranteed and it is up to the Client to guide the direction of the advice requested. While investments may be discussed, it is not the intention of this Agreement to provide complete investment advice. You are advised to consider an Investment Management Agreement instead of or in addition to this agreement if investment management is desired.

Section 2. Advisory Fees. Services provided by BRP will be performed at current Hourly rate. This rate may change after the period of this agreement with advanced warning to the client. Current rates are: \$100 per hour. This covers advice pertaining to portfolio asset allocation, retirement planning, college funding planning, risk management, etc. Payments are invoiced and due within 30 days of invoice. These billing rates may be changed with notice contained in subsequent editions of our ADV Part 2. While this form will be offered to clients at least annually, it is the duty of each client to request and read subsequent editions of this form.

Payment Method. You elect to pay Advisor for its services as follows:

You will receive an invoice showing the amount of the Financial Planning Service fees paid. You may pay via check or credit card.

You, the client, or we, BRP, may cancel the service at any time by notification via certified mail, email, phone, or website submission. Unearned, prepaid fees are returned to the client within 7 business days.

Section 3. Confidentiality. Except as otherwise agreed or as required by law, BRP will keep confidential all information concerning Your identity, financial affairs, or investments. All employees will respect the confidentiality of any information entrusted to, or obtained in the course of the employee's business or related professional activities. A BRP employee will not disclose any client information without the specific consent of the client unless in response to proper legal process, to defend against charges of wrongdoing by the employee, or in connection with a civil dispute between the employee and client.

Section 4. Risk Acknowledgment. BRP does not guarantee the future performance or success of any financial decision or strategy that BRP may give. You understand that financial recommendations for You by BRP are subject to various market, currency, economic, political and business risks, and that those decisions will not always be profitable. Except as may otherwise be provided by law, BRP will not be liable for (a) any loss arising from BRP's adherence to Your written or oral instructions; or (b) any act or failure to act to written or oral instructions. The federal and state securities laws impose liabilities under certain

circumstances on persons who act in good faith, and therefore nothing in this Agreement will waive or limit any rights that You may have under those laws.

Section 5. Binding Agreement. This Agreement will bind and be for the benefit of the parties to the Agreement and their successors and permitted assigns, except that this Agreement may not be assigned (within the meaning of the Advisors Act) by either party without the written consent of the other party.

Section 6. Governing Law. This Agreement will be governed by and construed in accordance with the laws of the State of Illinois without giving effect to any conflict or choice of law provisions of that State, provided that nothing in this Agreement will be construed in any manner inconsistent with the Advisors Act, any rule or order of the Securities and Exchange Commission under the Advisors Act and, if applicable to the Account, ERISA and any rule or order of the Department of Labor under ERISA.

Section 7. Notices. Any notice to be given to BRP under this Agreement will be delivered in person, by U.S. mail (postage prepaid), or courier to BRP at the address on the first page of this Agreement or at such other address as BRP may designate in writing. Any notice given to You under this Agreement will likewise be sent to You at their last known address.

Section 8. Standard of Conduct. Advisors of BRP acknowledge their responsibility to adhere to the standards established in Advisors Act, including the duty of care of a fiduciary.

Client and Adviser Adoption Signatures:

Client and Adviser both jointly adopt this Investment Policy Statement and agree that it is a work in progress that must be updated frequently in order to remain relevant and appropriate.

Client Name:	Representative of Bolmgren RetirePLAN, Inc.
Client Signature Date	Adviser Signature Date
Second Signature Date	Chief Compliance Officer Signature Date