

This page summarizes certain Know Your Client (KYC) data you have provided to us during the fact finding process. Accounts and/or assets marked with a * have not been offered, sold and/or serviced by [BD_NAME], [RIA_NAME], or its subsidiaries or affiliates (collectively, "[BD/RIA_Nickname]"). Valuations of certain assets such as real estate or personal property are based on estimates provided by you, and [BD/RIA_Nickname] makes no representations as to their value. This is not an official record of your assets or any account and/or contract, and it is provided for your convenience and information only. If there is a discrepancy between any of the information herein and the official records of your assets, accounts and/or contracts, the official records will take precedence. [BD/RIA_Nickname] makes no representation that the data presented herein, or in any other statement, is accurate. Please verify this data and advise us of any inaccuracies. [BD/RIA_Nickname] will not monitor or provide service regarding non-managed assets. All Rights Reserved (c) 2023 - Asset-Map(r) Holdings, Inc. Securities offered through Registered Representatives of [BD_NAME], a Broker/Dealer, Member FINRA/SIPC. Advisory services offered through [RIA_NAME], a Registered Investment Advisor. [DBA_Name] and [BD/RIA_Nickname] are not affiliated.