KEAP Kingswood Eudaimonia ASSET PLATFORM

KINGSWOOD

Custodian	Charles Schwab & Co.
Account Registration	
Account Number	

Wealth Management Agreement Supplement For KEAP Model Selection

Model Portfolio Statement of Investment Selection

The purpose of this statement is to establish an understanding between____(“Client”) and Kingswood Wealth Advisors, LLC regarding the investment objectives, goals, and guidelines for Client’s investment management. This statement is intended to provide guidance for the management of Client assets.

The advisor servicing your account has elected, after consultation with you, to utilize the services of Eudaimonia Asset Management, LLC (EAM), to assist in the overall management of your account assets. EAM is an affiliated registered investment advisor to Kingswood Wealth Advisors, LLC providing model portfolio services.

It is important to understand that accounts obtaining services through the programs of KEAP will be assessed an asset-based platform fee as stated here. As participation in KEAP programs increases by your Investment Adviser Representative (“IAR”), the Firm does provide breakpoints to reduce the access cost to clients of the IAR. This breakpoint reduction is based upon overall economies of scale and will directly reduce the cost of the account(s) for each client of the IAR utilizing KEAP services. The IAR does not receive any benefit from the Firm’s breakpoints. Eudaimonia acknowledges that providing access fee breakpoints in this manner does provide a type of inducement to utilize the programs of KEAP. The Firm mitigates such conflict through its oversight efforts and acknowledging that each breakpoint reduction directly reduces the revenues to the Firm as charges are reduced for clients.

KEAP Programs	Client Access Platform Fee
Strategic Eudaimonia Asset Management Core/Satellites (SEAM C/SEAM S)	13 basis points
Strategic Eudaimonia Asset Management Unified Managed Account (SEAM UMA)	19 basis points
Strategic Eudaimonia Asset Management Small Account (SEAM SA)	15 basis points

Program Selection

Through the election on the following pages, client understands the designated assets will be managed by EAM in accordance with established model guidelines and is not individualized to a particular client. The client acknowledges the right to identify assets within the account to be excluded from KEAP model management. The investment objectives, goals, and guidelines for the account will be based upon the information discussed between the Client and the IAR. The Client is responsible to identify changes to this information and communicate these changes to their IAR. EAM will only amend the program and portfolio elections upon instruction from your IAR.

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Please check the button below indicating the desired program selection. Choose ONE (1) PROGRAM ONLY.

- **SEAM Core/Satellites Program:** Mutual fund, ETF, and stock portfolios in a discretionary program that invest across multiple risk-tolerances (Core portfolios) and targeted approaches (Satellites portfolios) with a program minimum of $10,000. **SEAM Equity Growth portfolio has a minimum initial investment of $120,000.*
- **SEAM Unified Management Account (SEAM UMA) Program:** ETF and stock portfolios in a discretionary program that offer SEAM sleeves across multiple risk-tolerances with a program minimum that starts at $100,000. Certain portfolio minimums may be higher as mandated by the manager.
- **SEAM Small Account (SEAM SA) Program:** ETF-only portfolios in a discretionary program that invest across multiple risk-tolerances with a program minimum of $1,500.

Next select ONE (1) SEAM corresponding asset allocation portfolio based on program selection.

SEAM Core Portfolios:
INCLUDING Alternative Investments

- SEAM Aggressive Growth, Mutual Funds
- SEAM Growth, Mutual Funds
- SEAM Growth & Income, Mutual Funds
- SEAM Balanced, Mutual Funds
- SEAM Income with Growth, Mutual Funds
- SEAM Income, Mutual Funds

- SEAM Aggressive Growth, ETFs
- SEAM Growth, ETFs
- SEAM Growth & Income, ETFs
- SEAM Balanced ETFs
- SEAM Income with Growth, ETFs
- SEAM Income, ETFs

NOT INCLUDING Alternative Investments

- SEAM Aggressive Growth, Mutual Funds
- SEAM Growth, Mutual Funds
- SEAM Growth & Income, Mutual Funds
- SEAM Balanced, Mutual Funds
- SEAM Income with Growth, Mutual Funds
- SEAM Income, Mutual Funds

- SEAM Aggressive Growth, ETFs
- SEAM Growth, ETFs
- SEAM Growth & Income, ETFs
- SEAM Balanced ETFs
- SEAM Income with Growth, ETFs
- SEAM Income, ETFs

SEAM Satellites Portfolios:

- SEAM Equity Growth, Stocks
- SEAM Equity Cycle Rotation, ETFs
- SEAM Sector Plus, ETFs
- SEAM Dividend & Income, ETFs
- SEAM Risk Management, ETFs
- SEAM High Income, ETFs
- SEAM Conservative Income, ETFs
- SEAM High Income Muni, ETFs
- SEAM Conservative Income Muni, ETFs

SEAM UMA Portfolios:

- SEAM UMA – Aggressive Growth (Affluent)
- SEAM UMA – Moderate Growth (Affluent)
- SEAM UMA – Conservative Growth (Affluent)
- SEAM UMA – Aggressive Growth (HNW)
- SEAM UMA – Moderate Growth (HNW)
- SEAM UMA – Conservative Growth (HNW)
- SEAM UMA – Aggressive Growth (PW)
- SEAM UMA – Moderate Growth (PW)
- SEAM UMA – Conservative Growth (PW)
- SEAM UMA – Tactical Aggressive
- SEAM UMA – Tactical Moderate

SEAM SA Portfolios:

- SEAM SA Aggressive, ETFs
- SEAM SA Moderate, ETFs
- SEAM SA Conservative, ETFs
- SEAM SA Tactical, ETFs

SEAM Blended Portfolios:

- SEAM Elite Balanced Growth

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Fees

For each account enrolled in the chosen program of KEAP, the following fees will be debited from the account on a quarterly basis as a single fee. Questions related to the fee detailed here can be directed to your IAR or to the Chief Compliance Officer at (800) 535-6981 or malsoraimi@kingswoodus.com.

KEAP Platform Fee

Transaction fees not included. Trading by the portfolio manager(s) may result in a commission, markup or markdown that is embedded in the price of the investment. The investment models and strategies employed by EAM will incur differing transaction costs borne by the client based upon the trading frequency of the model or strategy. Please consult with your advisor for a full description of fees and costs related to your chosen program.

Acknowledgement

This Statement of Investment Selection supplements your executed Wealth Management Agreement and together memorializes the relationship between you, the IAR servicing your account and EAM. This Statement of Investment Selection is effective the date of execution and will remain in force until instructed otherwise in writing.

Client acknowledges client has received the following documents, has had the opportunity to review them, and understood the potential benefits, risks, fees, and other costs of the proposed services:

a. Kingswood Wealth Advisors, LLC Customer Relationship Summary (Form CRS).

b. Kingswood Wealth Advisors, LLC ADV Part 2A Firm Disclosure Brochure.

c. ADV Part 2B Individual Brochure Supplements for each IAR managing this Account.

These important disclosure brochures detail the relationship between our affiliated firms as well as the services provided by EAM when elected.

PRIMARY CLIENT SIGNATURE ______________________ PRIMARY CLIENT NAME (PRINT) ______________________

TITLE OR CAPACITY ______________________ DATE ______________________

JOINT CLIENT SIGNATURE ______________________ JOINT CLIENT NAME (PRINT) ______________________

TITLE OR CAPACITY ______________________ DATE ______________________

IAR SIGNATURE ______________________ IAR NAME (PRINT) ______________________

IAR REP/MASTER CODE ______________________ DATE ______________________

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