



BradfordCrane Company's Business Continuity Planning

BradfordCrane Company has developed a Business Continuity Plan on how we will respond to events that significantly disrupt our business. Since the timing and impact of disasters and disruptions is unpredictable, we will be flexible in responding to actual events as they occur. With that in mind, we are providing you with this information on our business continuity plan.

Contacting Us – If after a significant business disruption you cannot contact us as you usually do at 805 407 1694, or terry@peaceofmindwaypoints.com, you should call our alternative emergency contact number or go to our website at www.PeaceofMindwaypoints.com. Additionally, you may post a message in your financial planning software vault in addition to attempting to reach us at the listed emails and phone numbers.

Our Business Continuity Plan – We plan to quickly recover and resume business operations after a significant business disruption and respond by safeguarding our personnel and property, making a financial and operational assessment, protecting the firm's books and records, and allowing our customers to continue their financial planning process. In short, our business continuity plan is designed to permit our firm to resume operations as quickly as possible, given the scope and severity of the significant business disruption.

Our business continuity plan addresses: data backup and recovery; all mission critical systems; financial and operational assessments; alternate communications with customers, support personnel (if applicable), and regulators; alternate physical location of your financial planner; critical supplier, contractor, bank, and counter-party impact; regulatory reporting; and assuring our customers prompt access to their financial planning documents if we are unable to continue our business.

BradfordCrane Company does not manage assets or execute securities transactions, therefore we are not associated with a clearing firm. While every emergency situation poses unique problems based on external factors, such as time of day and the severity of the disruption, we are committed to restoring our operations accepting new transactions and payments in a timely manner.

Varying Disruptions – Significant business disruptions can vary in their scope, such as only our firm's office, the city where we are located or the whole region. Within each of these areas, the severity of the disruption can also vary from minimal to severe. In the event of a significant business disruption, we have plans to place to move to a back-up location or remote locations as necessary. In either situation, we plan to continue in business and notify you through our website www.PeaceOfMindWaypoints.com, the applicable financial planning software portal, or our customer business contact number, how to contact us. If the significant business disruption is so severe that it prevents us from remaining in business, we will assure our customer's prompt access to their financial planning documents, as applicable, in accordance with their letter of engagements, investment advisor agreements, and the BradfordCrane Company Brochure.

For more information – If you have questions about our business continuity planning, you can contact us at contact@peaceofmindwaypoints.com.