

Attachment A: Client Disclosure — BradfordCrane Company's Business Continuity Planning

BradfordCrane Company, LLC has a written Business Continuity and Succession Plan describing how we will respond to events that significantly disrupt our business, including the death or unavailability of our adviser. Because the timing and impact of disruptions are unpredictable, we will adapt our response to actual events.

Contacting us. If after a disruption you cannot reach us at 805-407-1694 or terry@peaceofmindwaypoints.com, please check our website at www.PeaceOfMindWaypoints.com for updates, or send a message through your financial planning portal. If our adviser cannot respond, our designated emergency contact will reach you by email or phone.

Our plan. We plan to resume services quickly by protecting our records, assessing the disruption, and moving to an alternate location if needed. Our plan covers data backup and recovery, critical systems, alternate communications with clients and regulators, office relocation, critical vendors, regulatory reporting, and what happens if our adviser dies or can no longer serve you.

Your assets. BradfordCrane Company does not hold, manage or trade client assets and has no custody of your funds or securities. A disruption at our firm does not affect your accounts at your own financial institutions.

If we cannot continue. If a disruption or the loss of our adviser prevents us from continuing, we will notify you promptly, give you access to the financial planning documents you are entitled to under your engagement agreement, refund any prepaid fees for services not provided, and, with your consent, help you transition to another adviser.

More information. Questions about our business continuity planning can be sent to admin@peaceofmindwaypoints.com.