ONE Plan Agreement

This agreement is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide. BondStreet will perform the following services to clients actively enrolled in the ONE Plan:

- **Administration -** We offer personal bill paying, budgeting and cash flow comparisons, bank reconciliations, and general ledger management. These services may also include family trusts. If you should need business services we would be happy to discuss a separate billing agreement.
- **Integrated Planning & Consulting -** We offer financial, tax, estate, and insurance planning, as well as trust planning/trust liaison, and real estate purchase and sale consultation.
- **Financial Accounting/Reporting -** We offer annual personal financial statements, performance reporting, and personal financial planning.
- **Philanthropy -** We offer assistance with philanthropic planning and charitable foundation planning.
- **Investment Planning & Management -** We offer investment allocation strategies, portfolio selection and oversight, performance analytics. We are licensed to invest in equities, funds, separately managed accounts, fixed income, and alternative strategies. If you prefer to maintain a separate investment advisor, or to maintain your own investments, you are free to do so.
- **Income Tax Return Preparation -** We offer preparation of your Federal personal and state tax returns, trust returns, and household employee payroll and tax forms.
- **Legal Counsel** (outsourced) **-** We offer preparation and/or review of your will(s), living trust(s), durable Power Of Attorney, and health care directives.
- **Family Continuity -** We offer assistance with legacy planning, and mentoring the younger generations on fiscal management and responsibility.

The staff of our sister company, Bauer Evans Inc. P.S., as well as outsourced professionals, will be working with the staff of BondStreet Wealth Management to provide the above services.

Our annual fee is based upon total personal assets, using a sliding scale. Please refer to our pricing schedule. By paying our annual fee (billed quarterly), you are free to use as many or as few of the above services as you wish. If you should choose to use any external professionals for assistance with tax preparation or legal counsel involving estate or trust planning, wills, living trusts, POA's or health care directives, we will pay said professionals up to 25% of our annual fee for such services.

This agreement may be terminated with 30 days written notice by either party.

Acknowledged on _________________________ by:

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Brian Evans, CPA/PFS
Principal/Wealth Manager
BondStreet Wealth Management, LLC
Bauer Evans, Inc. P.S.

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Client Signature

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Client Name (print)