

Use this form to provide additional required information when opening a new account, including all account owners, expected account activity, source of funds, and political exposure. Our custodian is required by regulation to obtain, verify, and record information which identifies each account owner to establish a financial services relationship. This may include requesting a copy of government-issued identifying documents or other documentation.

Upon initial review of the information provided, we may require additional documentation and/or clarification of information provided. New accounts will be restricted from all activities until this information is obtained and verified and will be closed if the information cannot be obtained and verified. Neither Freedom nor its custodian is responsible for losses or damages (including, but not limited to, lost opportunities) that may result from an account being restricted or closed as a result of your failure to provide the requested information or our inability to verify such information.

OPTION 1

Send via **DocuSign**

Using DocuSign is the fastest way to complete your request. If DocuSign is not an option, see the following instructions.

Sign via DocuSign

OPTION 2

Scan & Email

support@freedomadvisors.com

Know Your Client Addendum

Freedom Account Name:

Countries of Citizenship:

Freedom Account Number:

Country 1:

Country 2:

If not a US Citizen, are you a US Resident? Yes No

■ Source of Wealth & Expected Activity

Select the answer(s) that most closely represent the largest portion of your Personal Investments (Required):

Employment
Retirement / Pension
Inheritance / Gift

Assets
Divorce
Legal Settlement

Partner / Spouse
Parental Support
Personal Investments

Lottery / Gaming
Entrepreneur
Government Benefits

Employment Information:

Employment Status: Full Time Employed Part Time Employed Self Employed Unemployed Retired

Employer Name:

Annual Income:

Country of Workplace:

Employer Line of
Business:

If Source of Wealth is Assets:

Type of Asset:

If Asset Type is "Business":

Proceeds from Sale of Business? Yes No

Line of Business:

If Source of Wealth is Personal Investments:

Type of Investment:

Personal Investments Line of Business:

If Source of Wealth is Entrepreneur:

Name of Company:

Entrepreneur Line of Business:

Expected Activity

Select any products from the list in which you expect to invest, if applicable:

Low Priced
Securities

Marijuana Related
Securities

Do you anticipate sending or receiving domestic wire transfers? Yes No

Estimated number of domestic wire transfers per month:

Do you anticipate writing checks against your account? Yes No

Estimated number of domestic checks written per month.

Signature:

Date: