

Beagle Referral Agreement

Beagle Financial Services, Inc. (referred to as “Beagle”) offers a referral program to existing members and clients of Beagle .

Through Beagle’s referral program (“Beagle Referral Program”), you can invite others to sign up to become a Beagle member by sending them an email, text, social invitation, or other functionality provided by Beagle in connection with a referral.

Beagle may send up to five reminders to each person you invite. The reminders may be different from the original invite and can be canceled by emailing support@meetbeagle.com.

The Beagle Referral Program is only valid when (1) a referred person becomes a Beagle member with the qualifying minimum deposit (\$500) (“Qualified New Member”) and (2) your referring account remains open and funded.

Beagle is not responsible for incorrect entry or other failure of your invitees to meet requirements of a Qualified New Member.

For the first Qualified New Member referred by you, you will receive \$15; for each of Qualified New Member referred by you after that, you will receive \$30. The Qualified New Member referred by you will also receive \$15. For every year starting from 2022, the person who referred the most Qualified New Members in the previous calendar year will win \$5,000. The prize will be shared in the case of a tie.

The Beagle Referral Program is available to U.S. residents only. It is not valid with any other offers and is non-transferrable. Beagle reserves the right to terminate the Beagle Referral Program at any time and for any reason, and to recover any fees or prizes paid by Beagle if Beagle determines that the Beagle Referral Program was executed under wrongful or fraudulent circumstances, that inaccurate or incomplete information was provided in becoming a Beagle member, that any rules or regulations would be violated, or that any terms of this Beagle Referral Agreement have been violated.

In connection with referring others to become a Beagle member, you agree that:

- (1) You will follow all instructions you receive from Beagle;
- (2) You will only send invites to friends, family and people you know;
- (3) If you provide information about Beagle to your invitee, you will limit that to the information on the Beagle website and content;
- (4) You will not give your invitee investment advice or recommendations regarding their investment needs;
- (5) You will only participate in the Beagle Referral Program in accordance with the terms of this Referral Agreement and the following provisions of the Investment Advisers Act of 1940, as amended, and its rules (“Advisers Act”). You represent that: (1) you are not subject to any statutory disqualification set forth in Sections 203(e) and 203(f) of the

Advisers Act; (2) you are not currently the subject of any investigation or proceeding which could result in statutory disqualification; and (3) you do not have a "place of business" at which you regularly provide investment advisory services, solicit, meet with, or otherwise communicate with clients, or any other location that is held out to the general public as a location at which you provide investment advisory services, solicit, meet with, or otherwise communicate with clients in any U.S. state.

If you cannot accurately make the preceding representations, you may not participate in the Beagle Referral Program. If you are currently participating in the Beagle Referral Program and the preceding representations become inaccurate, you agree to immediately inform Beagle at support@meetbeagle.com.