# Addendum to Schedule A of the Investment Management Agreement

Client	Name
CIICIII	Nume

Joint Client Name \_\_\_\_\_ Date of Original IMA \_\_\_\_

Account 1:	New	Update				
Change	e Billing Instr	uctions				
Bill Each Accou	nt Separately	Bill to Accou	nt: Chang	ge Existing Debit Acc	count From	to
Custod	ian		Account Title	Account # Fee Struct		Fee Structure
						O Tiered
						♥ Flat Rate%
Investment Objective Risk Toleran		e Time Horizon		Time Horizon		
OPreservation o	f Capital		Conservative		O Near Te	ſm
OGrowth & Inco	me		O Moderately Conservative		O Very Sho	ort Term
Capital Apprec	iation		O Moderate		O Interme	diate
Speculation			O Moderately Aggressive		O Long Ter	ſm
OIncome			O Aggressive		C Legacy A	Account

#### Account 2: New

Change Billing Instru	uctions				
Bill Each Account Separately	Bill to Accou	nt: Chang	ge Existing Debit Acc	count From _	to
Custodian	Account Title		Account #		Fee Structure
					🔿 Tiered
					O Flat Rate%
Investment Objective Risk Tolerand		ce	Time Horizon		
OPreservation of Capital		O Conservative		O Near Te	rm
Growth & Income		O Moderately Conservative		O Very Short Term	
Capital Appreciation		O Moderate		OInterme	diate
O Speculation		Moderately Aggressive		O Long Te	rm
OIncome		O Aggressive		O Legacy A	Account

### Account 3 New

Update

Change Billing Instructions					
Bill Each Account Separately	Bill to Accou	nt: Chang	ge Existing Debit Ac	count From _	to
Custodian	Account Title		Account #		Fee Structure
					O Tiered
					O Flat Rate%
Investment Objective Risk Toleran		ze Time Horizon		Time Horizon	
OPreservation of Capital		Conservative		O Near Te	rm
OGrowth & Income		O Moderately Conservative		Very Short Term	
Capital Appreciation		O Moderate		O Interme	diate
O Speculation		O Moderately Aggressive	O Long Term		rm
OIncome		O Aggressive	O Legacy Account		

## **Certification & Signature(s):**

1. Client(s) acknowledges they have received the Spire Wealth Management, LLC form CRS.

2. This addendum does not imply a guarantee with respect to the attainment of Client's investment goals and objectives.

Client Name (Please Print)	Client Signature	Date	
Joint Client Name (Please Print)	Joint Client Signature	Date	
IAR Name (Please Print)	IAR Signature	Date	
Spire Principal (Please Print)	Spire Principal Signature	Date	
			1

## ADDENDUM SCHEDULE A FEB 2022