



Ascent

Retirement Advisors

Ascent Retirement Advisors, LLC

INVESTMENT ADVISORY CONTRACT

3455 N WINSOME PL
BOISE, ID, 83702

4/10/2023

The undersigned ("Client"), being duly authorized, has established an account (the "Account") and hereby agrees to engage Ascent Retirement Advisors, LLC ("ARA") on the following terms and conditions.

I. Appointment of ARA.

Client hereby appoints ARA as investment adviser for the Account and hereby delegates all powers with regard to investment and reinvestment of the assets in the Account. Client agrees to promptly notify ARA in writing of any changes to the information contained on the Client Information and Risk Tolerance or other information pertinent to the Account and to provide ARA with prior written notice of any changes in the identity of persons authorized to act on behalf of Client with respect to the Account.

II. Services by ARA.

By execution of this Agreement, ARA hereby accepts the appointment as investment adviser for the Account and agrees, as of the effective date set forth in the signature page below, to provide the services indicated below:

- (a) To supervise and direct the investments of the Account in accordance with the investment objectives of Client, and
- (b) to appraise and review investments in the Account.

It is understood and agreed that ARA, in the maintenance of records for its own purposes, or in making such records or the information contained therein available to Client or any other person at the direction of Client, does not assume responsibility for the accuracy of information furnished by Client or any other person.

III. Authority.

(Discretionary Investment Management)

ARA is authorized to execute purchases and sales of securities without securing prior authorization from the client.

Client authorizes ARA to respond to inquiries from, and communicate and share

information with Client's attorney, accountant, or other professionals.

IV. Client Accounts.

Client has opened or will open an account with a custodian or other authorized third party (the "Custodian") for the execution of securities transactions and custodial services. The Custodian at the time this Agreement is executed is identified in Exhibit I hereto. All funds/securities will be delivered between Client and the Custodian only. Client hereby authorizes ARA to receive from the Custodian a copy of any agreement between Client and the Custodian in effect at any time with respect to the Account.

V. Service to Other Clients.

It is understood that ARA may perform investment advisory services for various clients and that the services provided by ARA are rendered on a non-exclusive basis. Client agrees that ARA may give advice and take action in the performance of its duties with respect to any of its other clients which may differ with the advice given or action taken with respect to the Account. Nothing in this Agreement shall be deemed to confer upon ARA any obligation to acquire for the Account a position in any security which ARA, its principals, or its employees may acquire for its or their own accounts or for the account of any other client, if in the sole and absolute discretion of ARA it is not for any reason practical or desirable to acquire a position in such security for the Account.

VI. Inside Information.

ARA shall have no obligation to seek to obtain any material nonpublic ("inside") information about any issuer of securities and shall not purchase, sell, or recommend for the Account the securities of any issuer on the basis of any such information as may come into its possession.

VII. Liability.

ARA shall not be liable to Client for any independent acts or omissions by third

parties. A person who is not a party to this Agreement has no rights to enforce any term of this Agreement and this Agreement shall not be deemed to create any third party beneficiary rights.

VIII. Directions to ARA

All directions by Client to ARA (including notices, instructions, and directions relating to changes in the Client's investment objectives) shall be in writing. ARA shall be fully protected in relying upon any such direction, notice, or instruction until it has been duly advised in writing of changes therein. Please Note: By execution below, the Client acknowledges that there can be no assurance, nor expectation, that ARA shall act on any direction, instruction and/or notice on the day it is received.

IX. Proxies.

ARA will not ask for, nor accept voting authority for client securities. Clients will receive proxies directly from the issuer of the security or the custodian. Clients should direct all proxy questions to the issuer of the security.

X. Fees.

ARA's Annual Advisory Fee for investment management services provided under this Agreement shall be paid quarterly in advance, based upon a percentage (%) of the market value of the Assets under management in accordance with the fee schedule enclosed herewith as "Exhibit III - Strategy Selection and Annual Management Fee." If the Account is opened at any time other than the first day of the calendar quarter, the Annual Advisory Fee will be a prorated amount representing the time the Account was opened. Upon termination, ARA may issue Client a prorated refund of all unearned Annual Advisory Fees that were paid in advance. Any change to the Annual Advisory Fee shall be made with 30 days advance notice and with proper documentation. St

Client authorizes the Custodian of the Assets to charge the Account for the amount of ARA's fee and to remit such fee in compliance with regulatory procedures. Please Note: In the event that there is not sufficient cash in the Account to pay ARA's fee, ARA shall sell Assets to pay the fee.

In addition to ARA Annual Advisory Fee, Client may also incur, relative to: [1] all mutual fund and exchange traded fund ("ETF") purchases, charges imposed directly at the mutual fund or ETF level (e.g. advisory fees and other fund expenses); [2] independent investment managers, the fees charged by each separate manager who is engaged to manage the Assets; and [3] to the extent applicable, a Turnkey Asset Management Program ("TAMP") and/or platform fee.

XI. Valuation.

In computing the market value of any investment of the Account, the securities in the Account listed on a national securities exchange or otherwise subject to current last-sale reporting shall be valued at the amount reported on the statement that Client receives from the Custodian. Such securities which are not traded nor subject to last-sale reporting shall be valued at the latest available bid price reflected by quotations furnished to ARA by such sources as it may deem appropriate. Any other security shall be valued in such manner as shall be determined in good faith by ARA and Client to reflect the security's fair market value.

XII. Representations by Client.

The execution and delivery of this Agreement by Client shall constitute the representations by Client that the terms hereof do not violate any obligation by which Client is bound, whether arising by contract, operation of law or otherwise; that if Client is an entity other than a natural person (a) this Agreement has been duly authorized by appropriate action and is binding upon Client in accordance with its terms and (b) Client will deliver to ARA such evidence of such authority as ARA may

reasonably require, whether by way of a certified corporate resolution or otherwise; ARA is responsible only for the Account and not for the diversification or prudent investment of any outside assets or holdings of Client.

The following language of this section applies only if your Account is for a (a) pension or other employee benefit plan (including a 401(k) plan) governed by the Employee Retirement Income Security Act of 1974, as amended ("ERISA"); (b) tax-qualified retirement plan under section 401(a) of the Internal Revenue Code of 1986, as amended (the "Code"), and not covered by ERISA; or (c) an individual retirement account under the Code.

Client represents that ARA has been furnished true and complete copies of all documents establishing and governing the plan and evidencing Client authority to retain ARA. Client acknowledges that Client is a "named fiduciary" with respect to the control or management of the assets in the Account. Client will furnish promptly to ARA the governing plan documents, any amendment to the plan, and Client agrees that, if any amendment affects ARA's rights or obligations, then the amendment will be binding on ARA only when agreed to by ARA in writing. If the Account contains only a part of the assets of the plan, then Client understands that ARA will have no responsibility for the diversification of all of the plan's investments and that ARA will have no duty, responsibility, or liability for Client assets that are not in the Account. If the Employee Retirement Income Security Act of 1974, as amended ("ERISA") or other applicable law requires bonding with respect to the assets in the Account, then upon written request by ARA, Client will obtain and maintain at Client expense bonding that satisfies the requirements of Section 412 of ERISA and covers ARA and affiliated persons of ARA.

XIII. Representations by ARA.

By execution of this Agreement, ARA represents and confirms that it is registered as an investment adviser or exempt from

registration pursuant to applicable laws and regulations.

XIV. Amendment; Termination.

This Agreement contains the entire agreement between the parties, may not be modified or amended except in writing as executed by both parties, and remains in force and effect unless terminated by either party as discussed herein. Client may terminate the Agreement within five (5) business days of signing the Agreement, without penalty and fee.

XV. Notices.

All notices and other communications contemplated by this Agreement shall be deemed duly given if transmitted to ARA at the address set forth on the cover page of this Agreement to the attention of its Chief Compliance Officer, and to Client at the address appearing below, or at such other address or addresses as shall be specified, in each case, in a written notice similarly given.

XVI. Governing Law.

The validity of this Agreement and the rights and liabilities of the parties hereunder shall be determined in accordance with the laws of the state in which Client resides except to the extent preempted by ERISA or other federal or state laws or regulations.

XVII. Arbitration.

Subject to the conditions and exceptions noted below, and to the extent not inconsistent with applicable law, in the event of any dispute pertaining to ARA's services under this Agreement, both ARA and Client agree to submit the dispute to arbitration in accordance with the auspices and rules of the American Arbitration Association ("AAA"), provided that the AAA accepts jurisdiction. ARA and Client understand that such arbitration shall be final and binding, and that by agreeing to arbitration, both ARA and Client are waiving their respective rights to seek remedies in court, including the right to a jury trial. Client acknowledges that

he/she/it has had a reasonable opportunity to review and consider this arbitration provision prior to the execution of this Agreement.

XVIII. Exhibits.

The following Exhibits are attached hereto and incorporated as part of this Agreement:

Exhibit I - Identification of Accounts and risk tolerance

Exhibit II - Client information

Exhibit III - Strategy Selection and Annual Management Fee

XIX. Receipt.

Client acknowledges receipt of Form CRS, Form ADV Parts 2A and 2B, and ARA's Privacy Policy Statement.

XX. Consent to Electronic Delivery

Client hereby consents to receive via e-mail or other electronic delivery method for various communications, documents, and notifications from ARA. These items may include but are not limited to: all statements or reports produced by ARA; trade confirmations; billing invoices; all Form ADV brochures; privacy policy statements; and any other notices or documentation that ARA chooses to provide on an ongoing or occasional basis. Client agrees to immediately notify ARA of any changes to Client's e-mail address shown below or other electronic delivery address.

XXI. Assignment.

No assignment of this Agreement may be made by any party to this Agreement without the prior written consent of the other party hereto. Subject to the foregoing, this Agreement shall inure to the benefit and be binding upon the parties hereto, and each of their respective successors and permitted assigns.

XXII. Confidential Relationship.

All information and advice furnished by either party to the other shall be treated as confidential and shall not be disclosed to third parties except as required by law and as described in ARA's Privacy Policy Statement.

XXIII. Death or Disability.

If Client is a natural person, then Client's death, incapacity, disability, or incompetence will not terminate or change the terms of this Agreement. However, Client's guardian, executor, attorney-in-fact, or other authorized representative may terminate this Agreement by giving ARA written notice in accordance with the termination provisions of this Agreement.

XXIV. Title to Assets.

Except to the extent Client has notified, or in the future notifies, ARA in writing, Client represents that assets in the Account belong to Client free and clear of any lien or encumbrances.

XXV. Severability.

Any term or provision of this Agreement which is invalid or unenforceable in any jurisdiction shall, as to such jurisdiction, be ineffective to the extent of such invalidity or unenforceability without rendering invalid or unenforceable the remaining terms or provisions of this Agreement or affecting the validity or enforceability of any of the terms or provisions of this Agreement in any other jurisdiction.

XXVI. Market Conditions.

Client acknowledges that ARA's past performance and advice regarding client accounts cannot guarantee future results. **AS WITH ALL MARKET INVESTMENTS, CLIENT INVESTMENTS CAN APPRECIATE OR DEPRECIATE.** ARA does not guarantee or warrant that services offered will result in profit.

IN WITNESS THEREOF, the parties have executed this Agreement on the date stated below.


Client Signature	Client name	Date
Client Signature	Client name	Date
	Brad Christensen	8/19/2025
Advisor Signature	Advisor name	Date

Exhibit I - Identification of Accounts and Risk Tolerance

Below are the accounts (collectively, the "Account") included under this Agreement (see Sub-Advisory Trade Instructions):

Account Number	Account Type	Custodian	Risk Tolerance	Time Horizon
-	Non-Incorp	Schwab	Conservative	1+ years

Risk Tolerance

- **Speculative:** Emphasis on alternative investments that can fluctuate dramatically in value.
- **Aggressive:** Emphasis on investments that may fluctuate significantly.
- **Moderately Aggressive:** Emphasis on a mix of investments that may fluctuate significantly short-term with other more stable investments.
- **Moderate:** Emphasis on a mix of income-oriented and growth-oriented investments, diversified portfolio with some market volatility.
- **Moderately Conservative:** Emphasis on cautious investments with some market volatility.
- **Conservative:** Emphasis on cautious investments with little market volatility.

Exhibit II – Client Information and Risk Tolerance

Primary Client

First Name		Middle		Last Name	
Entity Name	Canyon County Ambulance District				
SSN/Tax ID		Date of Birth			
Phone		Email			
Street Address					
City		State:		Zip:	

Additional Client

First Name		Middle		Last Name	
Entity Name	Canyon County Ambulance District				
SSN/Tax ID		Date of Birth			
Phone		Email			
Street Address					
City		State		Zip	

General Financial Info

Gross Annual Household Income	n/a	Tax Bracket	n/a
Net Worth*	n/a	Liquid Net Worth*	n/a

*Definitions:

Net Worth: Assets, minus liabilities. In the client’s net worth calculation include stocks, bonds, mutual funds and other securities, bank accounts, and other personal property. A primary residence should not be included among the assets or liabilities that constitute net worth.

Liquid Net Worth: Net worth minus assets that cannot be converted quickly and easily into cash. TownSquare defines Liquid Net Worth as all assets that can be liquidated in 30 days, exclusive of real estate holdings. This includes, but is not limited to, checking & savings accounts, retirement accounts, all marketable securities, annuity accounts, cash, or cash equivalents.

Suitability

	Stocks	Bonds	Mutual Funds	Alternative Investments
Years of Experience	0	15	0	0

Client Acknowledgement and Execution

I certify that I am of full legal age in the state in which I reside, and I am authorized to open this account.

Under penalties of perjury, I hereby certify that : (1) The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and (2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and (3) I am a U.S. person (including a U.S. resident alien). The Internal Revenue Service does not require your consent to any provision of this document other than the certification required to avoid backup withholding.

By execution of this Agreement, the client agrees that Ascent Retirement Advisors, LLC shall have no responsibility (financial or otherwise) for any adverse consequences resulting from, or attributable to, investments purchased or sold, or investment strategies undertaken, prior to the client’s execution of this Agreement, including, but not limited to, investment losses, regardless of size or circumstances.


Client Signature	Client name	Date
Client Signature	Client name	Date
	Brad Christensen	8/19/2025
Advisor Signature	Advisor name	Date

Exhibit III: Strategy Selection and Fee



Sub-Advisory Trade Instructions



New Update

Primary Client First Name	MI	Last Name
Additional Client First Name	MI	Last Name

Account Number 2074-9446	
Account Type Non-Incorp	
Custodian Schwab	Rep Code 0839-5363

Strategy Selection and Annual Management Fee

Please select the strategies to be used in the account, fill in the annual fee, and sign below representing that you understand and accept the proposed fee. All management fees will be charged quarterly in advance, based on the account value of assets we manage on the last day of the preceding quarter. If the account is opened at any time other than the first day of a calendar quarter, the fees will be a prorated amount representing the time the account was opened. **The management fee plus any separate advisory fee, if applicable, will equal the total fee charged to the account.**

Initial Funding Order	Strategy Name	Strategy Code	Initial Funding Amount (\$ or %)
Sleeve 1	Short Duration Government Bond		2,400,000
Sleeve 2	Short Duration Investment Grade		600,000
Sleeve 3			
Sleeve 4			
Sleeve 5			
Sleeve 6			
Sleeve 7			
Sleeve 8			

REQUIRED - Approx. Total Dollar Amount: \$ 3,000,000

Annual Management Fee 0.43 %

Additional information that may help us better understand your investment needs.

*For internal instruction and reference.
 Please reach out to Brad@AscentRetirement.com for Bond Laddering and allocation instructions. This portfolio is subject to the parameters set by Idaho Statutes 67-1210 and 67-1210A, and must be applied to public funds from all municipal entities.
 Instructions for Trade Desk, including for regular deposits or withdrawals:

_____ Client Signature	_____ Client Name (print)	_____ Date
_____ Client Signature (if applicable)	_____ Client Name (print)	_____ Date
 Advisor Representative Signature	Brad Christensen Advisor Representative Name (print)	9/15/2025 Date

- Does allocation include bond ladder strategy? Yes (Bond Ladder Addendum required) No Previously Submitted
- Does allocation include structured income note strategy? Yes (Structured Income Note Addendum required) No Previously Submitted
- Are funds coming from ERISA Rollover? Yes (IRA Rollover Questionnaire required) No Previously Submitted

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Professional use only. Advisory services offered through TownSquare Capital LLC, a SEC Registered Investment Advisor



Form 2001 rv. 2022.10.14