



Service Agreement

Financial Advisor:

Prepared for:

This Service Agreement for financial planning and investment advisory services ("Agreement") is made by and between Pioneer Wealth Management Group ("Company"), a Texas corporation, a Registered Investment Adviser ("RIA") registered with the Securities and Exchange Commission ("SEC"), its Investment Adviser Representative(s) ("Financial Advisor") and the client(s) ("Client") identified on the signature page. This Agreement is for the limited purposes of providing financial planning and/or investment advisory services described below. The effective date of this Agreement is the date signed by Client.

A. Client Information

Full Name:	
New Client?	
Email:	
Phone:	
Street Address	
City, State ZIP	

B. Services & Fees

Please refer to ADV Part 2A to understand the scope of the services covered by the titles below.

	Service	Fee
	Asset Management	See ADV Part 2A for fee structure
	Annual Wealth Planning	
	Advisory Subscription	
	Ad Hoc Consulting	
	Hourly Consulting	
	Initial Onboarding	

C. Disclosures

Delivery of Firm Brochure

Client acknowledges receipt of Part 2 of Form ADV and Form CRS; disclosure statements containing the equivalent information; or disclosure statements containing at least the information required by Schedule H of Form ADV, if Client is entering into a wrap fee program sponsored by the investment adviser. If the appropriate disclosure statements were not delivered to Client at least 48 hours prior to Client entering into any written or oral advisory contract with this investment adviser, then Client has the right to terminate the contract without penalty within five business days after entering into the contract. Client also acknowledges receiving Company's privacy notice.

Basis of Recommendations

Client's selected service(s) will address Client's financial concerns based on Client's current financial situation and Client's future needs and objectives. Recommended services are based on a) the personal financial information that Client provides to Financial Advisor, b) assumptions that Client selects, and c) certain other planning assumptions determined by Company. Assumptions for investment returns, inflation, and tax rates will be disclosed to Client.

Client's Responsibilities

Client recognizes that the value and usefulness of the financial advisory service will be dependent upon their active participation and collaboration throughout data gathering, planning meetings, and implementation. If required, Client may be asked to complete a questionnaire provided by Financial Advisor. Client will also provide copies of financial documents as Financial Advisor may reasonably request in order to prepare recommendations and provide analyses for Client.

Client agrees to discuss their requirements, objectives, and projected future needs candidly with Financial Advisor. Client also agrees to promptly inform Financial Advisor of

material changes in circumstances, needs, objectives, and other information Client previously provided to Financial Advisor. Client further agrees that neither Financial Advisor nor Company shall have any liability for Client's failure to promptly inform Financial Advisor of material changes in Client's financial circumstances that may affect the manner in which Clients' assets are allocated.

Amending the Agreement

After looking at all of Client's financial data, Financial Advisor may find it necessary to recommend further assessment in a specific area that has not already been designated. If Client agrees, Client may be asked to sign a new agreement and pay an additional fee. Under those circumstances, this agreement will be null and void.

Client Identity and Information

Company is required by law to obtain certain personal information from Client that will be used by Company to verify Client's identity. If Client does not provide the required information to Company, Company may be unable to open Client's account. If Company is unable to verify Client's identity, Company reserves the right to suspend services, close Client's account, or take such other steps as Company deems reasonable.

Contract Termination or Assignment

If Client is not satisfied with the service provided for any reason whatsoever, Client can receive a full refund within 30 days of initial payment. Termination of the relationship can be made at any time by Client, and with reason by the Financial Advisor. No assignment of this agreement by Company will be effective without Client's written consent.

Arbitration

Any controversy or claim arising out of or relating to this contract, or the breach thereof, shall be settled by arbitration administered by the American Arbitration Association in accordance with its Arbitration Rules, and judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof. Unless otherwise agreed to by all of the parties to the arbitration (including without limitation Company and

Client), the American Arbitration Association shall be the sole venue for resolving claims arising out of or relating to this contract. This paragraph does not constitute a waiver of any right of private claim or cause of action provided by the Investment Advisers Act of 1940.

If either Client or Company, its employees, or independent contractors elects to resolve a claim by arbitration, that claim shall be arbitrated on an individual basis. There shall be no right or authority for any claims to be arbitrated on a class action basis or bases involving claims brought in a purported representative capacity on behalf of the general public, Clients, or other persons similarly situated. The arbitrator's authority to resolve claims is limited to claims between the parties to the arbitration, (including Client and Company) alone, and the arbitrator's authority to make awards is limited to the parties to the arbitration (including to Client and Company) alone. Furthermore, claims brought by Client against Company, its employees, or independent contractors, or by Company against Client, may not be joined or consolidated in arbitration with claims brought by or against someone other than Client, unless agreed to in writing by both Client and Company, its employees, or independent contractors.

Discretion

By execution of this Agreement, if Asset Management is selected, Client hereby establishes an Investment Advisory Account ("Account") and appoints Financial Advisor as the investment manager to supervise and direct the investments of Account on a discretionary basis. Accordingly, Financial Advisor will assume investment authority and investment decision-making over Account. Financial Advisor shall have discretion to trade in securities and to execute transactions with respect to Account assets without any obligation on its part to give prior notice to Client or the custodian.

D. Agreement

For the purposes of this provision, a contract is considered entered into when all parties to the contract have signed the contract, or, in the case of an oral contract, otherwise signified their acceptance, any other provisions of this contract notwithstanding.

	Name	Signature	Date
Client			
Financial Advisor			