

Solicitor Disclosure Document

WiserAdvisor is a third-party solicitor (“Solicitor”) for Creative Planning LLC (“Creative Planning”), an SEC registered investment adviser whose principal mailing address is 5454 W. 110th Street, Overland Park, KS 66211. Creative Planning, LLC provides investment advisory services. Please review Creative Planning’s Form ADV 2A (Brochure) included in the same list of materials as this document.

Solicitor has a written agreement with Creative Planning under which the Solicitor refers prospective clients in exchange for a fee from Creative Planning. Creative Planning pays Solicitor a monthly platform fee of \$5,000. Creative Planning also pays Solicitor for each referral based on the schedule outlined below.

Portfolio-Based Referral Fee Schedule (to be paid by Creative Planning)

Portfolio Range	Fee Paid by Creative Planning
\$100,000 - \$500,000	\$55
\$500,000 - \$1 million	\$150
\$1 million - \$3 million	\$200
\$3 million+	\$250

No portion of this fee will be charged to you and there will be no difference in the level of advisory fees that you will be charged by Creative Planning as a result of this referral arrangement.

It is entirely your decision and responsibility to hire and oversee Creative Planning. The presence of Solicitor does not alter your sole responsibility for determining to hire and retain Creative Planning. You understand and acknowledge that Solicitor’s role is limited exclusively to that of a solicitor and that Solicitor does not give, and has not given, investment-related advice on behalf of Creative Planning.

The SEC regulates the referral process and requires that Creative Planning receive a signed copy as verification that you received this information. If you choose to become a Creative Planning client, Creative Planning will request that you sign the acknowledgment below. *Please contact Creative Planning’s Compliance Department (cp.wealth.compliance@creativeplanning.com) if you have questions.*

Acknowledgment of Receipt

The undersigned client(s) hereby acknowledge receipt of (1) Form ADV Part 2A and (2) a copy of this Solicitor’s Disclosure Statement describing the arrangement between WiserAdvisor and Creative Planning.

_____	_____	_____
Print Client Name	Client Signature	Date
_____	_____	_____
Print Client#2 Name	Client#2 Signature	Date