



## **Business Continuity Plan Client Disclosure Statement**

Dynamic Wealth Advisors has developed a Business Continuity Plan to document how we will respond to events that significantly disrupt our business. In most cases, the impact of business disruptions is unpredictable. Consequently, we have to adapt in responding to situations that impact our business.

**Whom to Contact in the event of a disaster or business disruptions:** If you are unable to contact your financial advisor by phone or email, you may contact Dynamic Wealth Advisors Advisor Support Team at 877- 257-3840, Extension 1. If you are unable to reach either your financial advisor or Advisor Support, and you have immediate account service requirements, you should contact the custodian holding your account at one of the following numbers.

<b>Fidelity:</b>	<b>800-972-2155</b>
<b>Raymond James:</b>	<b>877-752-2237</b>
<b>Schwab:</b>	<b>800-515-2157</b>
<b>TD Ameritrade:</b>	<b>800-431-3500</b>

You may also access your account information through your client portal at [wealth360portal.com](http://wealth360portal.com). Your User ID is the email address you provided to your financial advisor.

**Our Business Continuity Plan:** We plan to quickly recover and resume business operations after a significant business disruption. We will respond by safeguarding our employees and property, making a financial and operational assessment, protecting the firm's books and records, and allowing our customers to transact business. In summary, our business continuity plan is designed to enable our firm to resume operations as quickly as possible, given the scope and severity of the significant business disruption.

Our business continuity plan addresses: data back-up and recovery; all mission critical systems; financial and operational assessments; alternative communications with customers, employees, and regulators; alternate location of employees; critical supplier, contractor, bank and counter-party impact; regulatory reporting; and assuring our customers prompt access to their investments if we are unable to continue our business.

While most transactions done through us are not time sensitive, every emergency situation poses unique problems based on external factors, such as time of day and the severity of the disruption. Each custodian with which you have investments desires to restore its own operations and be able to complete existing transactions and accept new transactions and payments within a short period of time, your orders and requests for funds and securities could be delayed during this period.

If you have questions about our business continuity planning, you can contact us at 877-257-3840, extension 1 or by email at [compliance@dynamicwealthadvisors.com](mailto:compliance@dynamicwealthadvisors.com).