



## WEALTHTENDER VOICE OF THE CLIENT AWARD LOGO LICENSING AGREEMENT

This Licensing Agreement dated as of \_\_\_\_\_ (the "Effective Date") is entered into by Wealthtender, Inc. ("Wealthtender" or "Licensor") and \_\_\_\_\_ ("Licensee"). The named parties agree to and the Licensee acknowledges the following:

**1. Wealthtender grants Licensee a limited, non-transferable, and non-exclusive license to use one or more of the following Wealthtender Award Logos, as indicated below, in accordance with the terms of this Licensing Agreement:**

2026 Voice of the Client Highly Rated Advisor Award(s) for \_\_\_\_\_  
 2026 Voice of the Client Highly Rated Firm Award for \_\_\_\_\_

Licensee acknowledges that this Agreement applies only to the Wealthtender Award Logo(s) selected above (applicable exclusively to the named financial advisor(s) and/or firm) and all terms and conditions outlined herein govern their use.

### 2. Licensing Cost

There is no cost for Licensee to display a Wealthtender Award Logo(s) on Licensee's Wealthtender profile page(s) or to promote a Wealthtender award using plain text or a link in email signatures, newsletters, social media, and website pages.

To display a Wealthtender Award Logo(s) in digital or print format beyond Licensee's Wealthtender profile page(s), Licensee must first execute this Licensing Agreement and pay any applicable licensing fees described in the table below.

2026 Highly Rated Advisor Licensing Fees	2026 Highly Rated Firm Licensing Fees
Upon execution of the Licensing Agreement, there is no cost for financial advisors to use the <b>Highly Rated Advisor</b> award logo.	The licensing fee for <b>Highly Rated Firm</b> award logo use by wealth management firms is calculated based on <b>(A)</b> the number of its financial advisors used in the Highly Rated Firm Award calculation multiplied by \$30, and reduced by credits equal to <b>(B)</b> the number of its individual financial advisors with profiles on Wealthtender as of the award date multiplied by \$25.

Licensee fees are calculated as follows:

\$0 2026 Voice of the Client Highly Rated Advisor Award Fee: \$0

\_\_\_\_\_ 2026 Voice of the Client Highly Rated Firm Award Fee (calculated as follows):

- Number of Licensee's financial advisors used in the Highly Rated Firm Award calculation: \_\_\_\_\_ **(A)**
- Number of Licensee's individual financial advisors with profiles on Wealthtender: \_\_\_\_\_ **(B)**
- Licensing fee calculation:  $[(A) \text{ } x \text{ } \$30] \text{ minus } [(B) \text{ } x \text{ } \$25] = (C) \text{ } \$ \text{ } _____$
- Licensee fee total **(C)**: \$ \_\_\_\_\_

Licensee agrees to pay Wealthtender **(C)**: \$ \_\_\_\_\_

Within 4 days of Wealthtender's receipt of the executed Agreement, Wealthtender will charge Licensee's form of payment on file, unless Licensee requests an alternative payment method prior to or concurrent with execution of this Agreement.

This Licensing Agreement allows the Licensee to use the Wealthtender Award Logo(s) in accordance with this Agreement and the Terms of Use attached as Exhibit A. The Agreement becomes effective upon execution.

Upon execution of this Licensing Agreement and payment of licensing fee, this Agreement allows Licensee to use the Wealthtender Award Logo(s) in perpetuity.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the Effective Date.

Licensor: Wealthtender, Inc.

Licensee: \_\_\_\_\_

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: Brian Thorp

Name: \_\_\_\_\_

Title: President and CEO

Title: \_\_\_\_\_

## Exhibit A

### Wealthtender Voice of the Client Awards Terms of Use

Last updated: June 1, 2025

## Wealthtender Voice of the Client Awards Terms of Use

Terms and Conditions for Wealthtender Voice of the Client Highly Rated Advisor and Highly Rated Firm Awards

Wealthtender, Inc. ("Wealthtender"), as Licensor, is responsible for exercising reasonable control over the use of the Wealthtender Award Logos ("Award Logos"). The Award Logos are exclusive to Wealthtender and can only be used by authorized financial advisors and wealth management firms that have entered into licensing agreements with Wealthtender ("Licensees") and, as required by such licensing agreements, that have agreed to these terms and conditions ("Terms and Conditions"). These Terms and Conditions set forth the terms and conditions under which a Licensee may use the Award Logos in digital or print format beyond Licensee's Wealthtender profile page(s).

Licensee agrees that its use of the Award Logos is governed by these Terms and Conditions. If Licensee fails to remedy improper uses after notice from Wealthtender, Licensee may be denied the right to use the Award Logos, including termination of their license agreement for the same.

**Sublicensing.** Licensee does not have the authority to sublicense or approve third party uses of the Award Logos. However, this does not prohibit Licensee from engaging printers or publishers to use the Award Logos in materials prepared for the Licensee as long as such uses are consistent with these Terms and Conditions.

**Ownership.** Licensee agrees that Wealthtender owns all right, title, and interest in and to the Award Logos, including but not limited to all information, content, text, graphics, all copyrights, and all other intellectual property rights in and to the foregoing, including all derivative works thereof and modifications thereto. Except as expressly granted herein, Licensee acquires no right or title to the Award Logos or the content incorporated therein. Licensee will not directly or indirectly obtain or attempt to obtain at any time, any right, title or interest by registration or otherwise in or to the Award Logos. Licensee acknowledges that the goodwill associated with the Award Logos belongs exclusively to Wealthtender. For purposes of clarification, this Agreement does not grant Wealthtender any ownership interest in Licensee's services that incorporate the Award Logos, except for those rights in the Award Logos contained therein.

**Termination.** Unless otherwise terminated by Wealthtender in exercise of its rights hereunder, the term of Licensee's license to use the Award Logos shall be as set forth in the license agreement between Wealthtender and Licensee. Upon the expiration or termination of the license agreement between Wealthtender and Licensee pertaining to the Award Logos: (i) all licenses to the Award Logos hereunder or thereunder, as applicable, shall immediately terminate, and Wealthtender shall have the right to immediately suspend or remove Licensee's access to such Award Logos, and (ii) Licensee shall immediately cease using the Award Logos, including deleting all use of the Award Logos from its systems, sites, and software, and instructing any third parties who are hosting or otherwise publishing electronic or physical embodiments of the Award Logos on behalf of Licensee to do the same. Wealthtender looks for consistent observance of these Terms and Conditions by Licensees and will monitor, identify, and correct any uses not permitted under the Terms and Conditions, including termination of Licensee's license to the Award Logos if Licensee fails to timely cure any breach of these Terms and Conditions.

DISCLAIMER OF WARRANTIES. THE AWARD LOGOS ARE PROVIDED "AS IS" AND WEALTHTENDER DOES NOT WARRANT AND SPECIFICALLY DISCLAIMS ANY REPRESENTATION THAT THE AWARD LOGOS OR ANY COMPONENT OF ANY OF THE AWARD LOGOS, WILL MEET LICENSEE'S REQUIREMENTS OR THAT LICENSEE'S USE OF THE AWARD LOGOS WILL BE UNINTERRUPTED OR ERROR FREE. WEALTHTENDER DOES NOT MAKE, AND LICENSEE DOES NOT RECEIVE, ANY REPRESENTATION OR WARRANTY (EXPRESS OR IMPLIED) REGARDING THE AWARD LOGOS. THE WARRANTIES STATED IN THESE TERMS AND CONDITIONS ARE IN LIEU OF ALL OTHER WARRANTIES AND CONDITIONS EXPRESSED OR IMPLIED INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. WEALTHTENDER DISCLAIMS ALL WARRANTIES (EXPRESS, IMPLIED, STATUTORY, OR OTHERWISE) TO THE EXTENT ALLOWED BY APPLICABLE LAW.

Definitions. Please note the following definition:

**Award Logos:** The images designed by Wealthtender to identify the financial advisor and/or wealth management firm's award (a static image)

Usage Guidelines for Award Logos:

Licensee may not alter the format of the Award Logos. The date-stamped Award Logo (e.g., 2025) must be present at all times. No alterations, modifications, or removal of date stamps from the Award Logos are permitted.

Licensee is responsible for ensuring all necessary regulatory disclosures and firm disclosures accompany use of the Award Logos.

To supplement its disclosures accompanying Award Logos or to provide consumers with additional details and access to FAQs about Wealthtender Voice of the Client Awards, Licensee may link to the following URL:  
<https://wealthtender.com/wealthtender-voice-of-the-client-awards/>

Licensee must not use Award Logos applicable to a particular individual advisor (e.g., a Highly Rated Advisor Award) in a deceptive manner (e.g., on a wealth management firm website homepage without accompanying disclosure specifying the particular individual advisor as the award recipient).

Licensee may use the Award Logos under the following circumstances as noted below:

- Printed communications (e.g., brochures, press releases, post cards, newspapers, signage, etc.)
- Internet uses (e.g., Licensee's website(s), social media profiles/posts, directory listings)
- Other uses upon request and subsequent written approval from Wealthtender (To request other uses, Licensee should submit a written request by email to [yourfriends@wealthtender.com](mailto:yourfriends@wealthtender.com) describing its proposed use. Wealthtender will respond to Licensee by email within 2 business days.)

For more information or questions about correct/incorrect uses, or to report potential misuses of Award Logos, please contact Wealthtender at [yourfriends@wealthtender.com](mailto:yourfriends@wealthtender.com).