

IMPORTANT DISCLOSURE INFORMATION

BKD Wealth Advisors, LLC or BKD Wealth Advisors DBA BKD Family Office (“*Company*”) is an SEC-registered investment adviser located in Springfield, Missouri. *Company* and its representatives are in compliance with the current filing requirements imposed upon SEC-registered investment advisers by those states in which *Company* maintains clients. *Company* may only transact business in those states in which it is registered, or qualifies for an exemption or exclusion from registration requirements. *Company*’s website is limited to the dissemination of general information pertaining to its advisory services, together with access to additional investment-related information, publications, and links. Accordingly, the publication of *Company*’s website on the internet should not be construed by any consumer and/or prospective client as *Company*’s solicitation to affect, or attempt to affect transactions in securities, or the rendering of personalized investment advice for compensation, over the internet. Any subsequent, direct communication by *Company* with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. For information pertaining to the registration status of *Company*, please contact the SEC or the state securities regulators for those states in which *Company* maintains a notice filing. A copy of *Company*’s current written disclosure statement discussing *Company*’s business operations, services, and fees is available from *Company* upon written request. ***Company* does not make any representations or warranties as to the accuracy, timeliness, suitability, completeness, or relevance of any information prepared by any unaffiliated third party, whether linked to *Company* website or incorporated herein, and therefore takes no responsibility. All such information is provided solely for convenience purposes only and all users thereof should be guided accordingly.**

Please remember that different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment or investment strategy (including those undertaken or recommended by *Company*), will be profitable or equal any historical performance level(s).

Certain portions of *Company*’s website, *e.g.*, newsletters, articles, commentaries, etc., may contain a discussion of, and/or provide access to, *Company* (and those of other investment and noninvestment professionals) positions and/or recommendations as of a specific prior date. Due to various factors, including changing market conditions, such discussion may no longer be reflective of current position(s) and/or recommendation(s). Moreover, no client or prospective client should assume that any such discussion serves as the receipt of, or a substitute for, personalized advice from *Company*, or from any other investment professional. *Company* is neither an attorney nor an accountant, and no portion of the website content should be interpreted as legal, accounting or tax advice.

To the extent that any client or prospective client uses any economic calculator or similar interactive device contained within or linked to *Company*’s website, the client and/or prospective client acknowledges and understands that the information resulting from the use of any such calculator/device, is not, and should not be construed, in any manner whatsoever, as the receipt of, or a substitute for, personalized individual advice from *Company*, or from any other investment professional.

Each client and prospective client agrees, as a condition precedent to his/her/its access to *Company*’s website, to release and hold harmless *Company*, its officers, directors, owners, employees and agents from any and all adverse consequences resulting from any of his/her/its actions and/or omissions which are independent of his/her/its receipt of personalized individual advice from *Company*.

Assets Under Management

Assets Under Management include all accounts for which BKDWA has transactional authority. This could include discretionary or nondiscretionary accounts.

Assets Under Advisement include assets for which BKDWA does not have transactional authority. Rather, BKDWA has an ongoing duty to monitor accounts and provide advice to clients.

Rankings & Recognition

Rankings and/or recognition by unaffiliated rating services and/or publications should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if *Company* is engaged, or continues to be engaged, to provide investment advisory services, nor should it be construed as a current or past endorsement of *Company* by any of its clients. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser.

Rankings determined by methodology as described on the website of each respective publication.

Accounting Today: <http://pages.marketing.accountingtoday.com/rs/555-ETU-514/images/2018-Wealth-Magnets-Special-Report.pdf?aliid=1823398672>

CNBC: <https://www.cnbc.com/2015/06/03/cnbc-charts-the-top-100-firms.html>

Financial Times: <https://www.ft.com/content/1ad3a626-2c30-11e7-bc4b-5528796fe35c>

Forbes: <https://www.forbes.com/sites/juliecooling/2016/11/14/top-100-ria-firms-by-ten-year-growth/#69880b526b1f>

Client Survey

The survey was sent in October 2017 to core and impact clients (typically clients with \$750,000 or more in assets under management) and retired partners. Current partners and employees of BKD were excluded from this survey. The survey was sent to approximately 630 clients. This survey solicited information regarding clients' likelihood of referrals, satisfaction level, expectations and overall comfort with BKD Wealth Advisors. Satisfaction is not an indication of returns. Clients could remain anonymous in their responses. The survey response rate was 47 percent. The rating is an average response of all clients who participated in the survey and may not represent any one client's experiences or future performance. BKD Wealth Advisors paid ActiFi to conduct the survey. Surveys were submitted directly to ActiFi and ActiFi calculated overall results.

Clients were excluded from the survey if they were not clients before January 2017. 401(k) plans were excluded from the survey. Donor-advised fund accounts were not included in the survey; however, the donor may have been surveyed as an individual account holder. Certain otherwise qualifying clients with no access to computer or email were removed from survey. Some clients were removed from the survey due to advanced age or severe medical conditions. Certain clients in midtransition from one advisor to another did not receive the survey. Some clients may serve in multiple capacities as a trustee and individual. Clients in this situation may have only received one survey. Certain otherwise qualifying client have opted out of this and future surveys as noted in BKDWA's CRM.