

IMPORTANT DISCLOSURE INFORMATION

BKD Wealth Advisors, LLC (BKDWA) is an SEC-registered investment adviser located in Springfield, Missouri. BKDWA and its representatives are in compliance with the current filing requirements imposed upon SEC-registered investment advisers by those states in which BKDWA maintains clients. BKDWA may only transact business in those states in which it is registered, or qualifies for an exemption or exclusion from registration requirements. BKDWA'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 BKDWA's website on the internet should not be construed by any consumer and/or prospective client as BKDWA'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 BKDWA 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 BKDWA, please contact the SEC or the state securities regulators for those states in which BKDWA maintains a notice filing. A copy of BKDWA's current written disclosure statement discussing BKDWA's business operations, services, and fees is available from BKDWA upon written request. **BKDWA 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 BKDWA 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 BKDWA), will be profitable or equal any historical performance level(s).

Certain portions of BKDWA's website, e.g., newsletters, articles, commentaries, etc., may contain a discussion of, and/or provide access to, BKDWA (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 BKDWA, or from any other investment professional. BKDWA 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 BKDWA'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 BKDWA, or from any other investment professional. Each client and prospective client agrees, as a condition precedent to his/her/its access to BKDWA's website, to release and hold harmless BKDWA, 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 BKDWA.

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 by each respective publication.

Forbes – Top 100 Registered Investment Advisors (RIAs) Of 2019 By Assets

“Forbes” is a registered mark of Forbes, LLC. Data for the Forbes “Top 100 Registered Investment Advisors (RIAs) Of 2019 By Assets” list is compiled by Forbes’ partners at RIA Channel, an affiliate of RIA Database, an independently owned and operated data company that collects and profiles financial advisory firms. The list includes 100 firms based on both size and growth in assets.

RIA Channel ranked the Top 100 RIA firms of 2019 based on a proprietary set of criteria and data. The ranking is based on both size and growth in assets. RIA Database (RIADatabase.com) was used for regulatory data, organic research, and advisor surveys. We recognize these firms as leaders in their field and congratulate them on their success. Assets under management are as reported to the SEC as of November 15, 2019.

Neither BKD Wealth Advisors, LLC (“BKDWA”) nor any other participating advisers paid a fee to be eligible for the “Top 100 Registered Investment Advisors (RIAs) Of 2019 By Assets” ranking. BKDWA is unaware of any undisclosed facts that could potentially invalidate the appropriateness of the ranking. By virtue of disclosing this ranking, BKDWA is disclosing favorable ratings (to the extent that BKDWA is ranked above other advisors) and unfavorable ratings (to the extent that BKDWA is ranked below other advisors). The ranking may not be representative of any one client’s experience because of the way in which it is calculated. The ranking is independently granted. The ranking is absolutely not indicative of BKDWA’s and its advisors’ future performance, or any future performance pertaining to its clients’ investments. This ranking or any other rankings and/or recognition by unaffiliated rating services and/or publications should not be construed as a guarantee that a client will experience a certain level of results or satisfaction if BKDWA is engaged, nor should it be construed as a current or past endorsement by any of its clients. A copy of BKDWA’s current written disclosure statement discussing its advisory services and fees remains available upon request. Information about the methodology behind the Top 100 Registered Investment Advisors (RIAs) Of 2019 By Assets ranking is available at the following link:

<https://www.riachannel.com/top-100-wealth-managers-ranking-2019/>

Accounting Today – Top Firms by AUM

Accounting Today, a SourceMedia brand, is a leading information resource for public accountants. Data for the Accounting Today “The Top 150 Firms by AUM” list is provided by Audit Analytics, a premium online intelligence service that delivers audit, regulator, and disclosure analysis to the accounting community. The list includes 150 firms based on reported assets under management.

The 2021 Top 150 Firms by AUM ranking is based on submissions made by more than 200 firms. AUM reported for each firm was based on the “as of” date supplied by the reporting firm, which in no case was earlier than year-end 2020.

Neither BKD Wealth Advisors, LLC (“BKDWA”) nor any other participating advisers paid a fee to be eligible for the “Accounting Today 2021 Top 150 Firms by AUM” ranking. BKDWA is unaware of any undisclosed facts that could potentially invalidate the appropriateness of the ranking. By virtue of disclosing this ranking, BKDWA is disclosing favorable ratings (to the extent that BKDWA is ranked above other advisers) and unfavorable ratings (to the extent that BKDWA is ranked below other advisers). The ranking may not be representative of any one client’s experience because of the way in which it is calculated. The ranking is independently granted. The ranking is absolutely not indicative of BKDWA’s and its advisers’ future performance, or any future performance pertaining to its clients’ investments. This ranking or any other rankings and/or recognition by unaffiliated rating services and/or publications should not be construed as a guarantee that a client will experience a certain level of results or satisfaction if BKDWA is engaged, nor should it be construed as a current or past endorsement by any of its clients. A copy of BKDWA’s current written disclosure statement discussing its advisory services and fees remains available upon request.

The full ranking and additional information about the methodology behind the Accounting Today 2021 Top 150 Firms by AUM ranking is available at the following link: <https://www.accountingtoday.com/report/the-top-firms-by-aum-sr>

CNBC – Financial Advisors Top 100 of 2021

Methodology for the CNBC Financial Advisors Top 100 of 2021 ranking was established by CNBC in partnership with data provider AccuPoint Solutions

The methodology consisted of first analyzing a variety of core data points from AccuPoint Solutions’ database of registered investment advisers. This analysis started with an initial list of 38,302 RIA firms. Through a process, the list was eventually cut to 749 RIAs, with those firms meeting CNBC’s proprietary criteria. (All the data collected from the RIAs was information culled from the firm’s filings with the Securities and Exchange Commission.)

CNBC staff sent an email survey to all those firms that met the initial criteria to gather more details. AccuPoint again applied CNBC’s proprietary weighted categories to further refine and rank the firms, ultimately creating the list of the top 100.

The primary data points used in the analysis were reviewed, either as a minimum baseline or within a range, eliminating those firms that did not meet CNBC's requirements. Once the initial list was compiled, weightings were also applied accordingly. These data points included: (1) Advisor's compliance record; (2) Number of years in the business; (3) Number of employees; (4) Number of investment advisors registered with the firm; (5) The ratio of investment advisors to total number of employees; (6) Total assets under management; (7) Percentage of discretionary assets under management; (8) Total accounts under management; (9) Number of states where the RIA is registered; and (10) Country of domicile.

Neither BKD Wealth Advisors, LLC ("BKDWA") nor any other participating advisers paid a fee to be eligible for the "CNBC Financial Advisors Top 100 of 2021" ranking. BKDWA is unaware of any undisclosed facts that could potentially invalidate the appropriateness of the ranking. By virtue of disclosing this ranking, BKDWA is disclosing favorable ratings (to the extent that BKDWA is ranked above other advisors) and unfavorable ratings (to the extent that BKDWA is ranked below other advisors). The ranking may not be representative of any one client's experience because of the way in which it is calculated. The ranking is independently granted. The ranking is absolutely not indicative of BKDWA's and its advisors' future performance, or any future performance pertaining to its clients' investments. This ranking or any other rankings and/or recognition by unaffiliated rating services and/or publications should not be construed as a guarantee that a client will experience a certain level of results or satisfaction if BKDWA is engaged, nor should it be construed as a current or past endorsement by any of its clients. A copy of BKDWA's current written disclosure statement discussing its advisory services and fees remains available upon request.

The full ranking and additional information about the methodology behind the CNBC Financial Advisors Top 100 of 2021 is available at the following link: [FA 100: CNBC ranks the top-rated financial advisory firms of 2021](#)

Financial Times 300: Full 2017 List of Top US Registered Investment Advisers

Research for the award was conducted on behalf of the Financial Times by Ignites Research, a Financial Times sister publication (collectively, "FT"). An initial pool of candidates was identified, each of which had reported more than \$300 million in assets under management to the United States Securities and Exchange Commission. FT attempted to obtain verified data from uninterested sources by using objective and quantifiable measures to establish the initial candidate pool, rather than relying on self-reporting by advisers.

FT then invited approximately 2,000 qualifying firms, including BKD Wealth Advisors, LLC ("BKDWA"), to complete a questionnaire to provide further details on the firms' practices. The responses to these questionnaires were then combined with internal research, including data from regulatory filings.

The criteria used to select firms for inclusion in the final ranking, and to determine each firm's placement in the final rankings, were: (1) assets under management; (2) growth rate of assets under management; (3) firm years in existence; (4) compliance record and disciplinary history; (5) industry certifications and designations; and (6) online accessibility. Assets under management was weighted to account for approximately 65-70% of each adviser's final score. FT also placed caps on the number of

advisers from any particular state, distributed roughly in accordance with the distribution of millionaires across the country.

Neither BKDWA nor any other participating advisers paid a fee to be eligible for the Financial Times Top 300 ranking. BKDWA is unaware of any undisclosed facts that could potentially invalidate the appropriateness of the ranking. By virtue of disclosing this ranking, BKDWA is disclosing favorable ratings (to the extent that BKDWA is ranked above other advisers) and unfavorable ratings (to the extent that BKDWA is ranked below other advisers). The FT ranking is comprised of the top 300 advisers out of approximately 2,000 qualified firms and 760 responding firms. The ranking may not be representative of any one client's experience because of the way in which it is calculated. The ranking is independently granted. The ranking is absolutely not indicative of BKDWA's and its advisers' future performance, or any future performance pertaining to its clients' investments. This ranking or any other rankings and/or recognition by unaffiliated rating services and/or publications should not be construed as a guarantee that a client will experience a certain level of results or satisfaction if BKDWA is engaged, nor should it be construed as a current or past endorsement by any of its clients. A copy of BKDWA's current written disclosure statement discussing its advisory services and fees remains available upon request.

Additional information about the methodology behind the Financial Times Top 300 ranking and the full list of recognized firms are available at the following link: <https://www.ft.com/content/1ad3a626-2c30-11e7-bc4b-5528796fe35c>.

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.