7702 E. Doubletree Ranch Road, Suite 300, Scottsdale, Arizona 85258

BUSINESS CONTINUITY PLAN - CLIENT SUMMARY

Updated September 15, 2026

Evolve Wealth Advisors LP ("EWA") maintains a Business Continuity Plan designed to support the continuation or prompt recovery of critical business operations following a Significant Business Disruption ("SBD"). The Plan is intended to protect client interests, safeguard books and records, restore communications and operations, and help ensure clients retain access to their accounts and assets.

EWA PREPAREDNESS

If EWA cannot operate from its normal office locations, the Firm may operate from alternate locations or remotely using secure systems. EWA maintains electronic records through online digital backup, including Microsoft SharePoint, and maintains procedures for alternative communications with clients, employees, custodians and regulators.

CLIENT ACCOUNTS AND CUSTODIANS

EWA does not hold client funds or securities. Client accounts are maintained by independent custodians. EWA currently utilizes Charles Schwab & Co., Inc. and, for a limited number of accounts/assets, Interactive Brokers LLC (IBKR). During an SBD, clients will continue to have direct access to their accounts through their respective custodian and may contact the custodian directly regarding funds, securities, distributions or other account-related matters.

Custodian	Address	Telephone
Charles Schwab & Co., Inc.	Advisor Services - Omaha Operations Center, 200 S 108th Avenue, Omaha, NE 68154	(877) 687-4085
Interactive Brokers LLC	One Pickwick Plaza, Greenwich, CT 06830	(866) 694-2757

COMMUNICATIONS AND CONTINUITY

EWA will use reasonable efforts to maintain or restore communications with clients and custodians and to continue servicing client accounts to the extent reasonably practicable. Depending on the circumstances, EWA may communicate by telephone, secure email, videoconferencing, U.S. mail, the Firm's website, or other available means. Clients may contact EWA at (602) 805-5683.

KEY PERSONNEL AND SUCCESSION

The Plan identifies Peter J. Henry (CEO), Patrick L. Kinney (COO and CCO), and Jayson G. Moss (CIO) as key personnel and establishes interim succession arrangements if a key partner is unable to perform his duties. The objective is to maintain continuity of management, supervision, investment operations and client service until normal operations resume or a permanent arrangement is approved.

REVIEW OF THE PLAN

EWA updates its Business Continuity Plan when material changes occur and reviews the Plan at least annually. The current Business Continuity Plan was reviewed and approved on September 15, 2026. This website summary is intended to provide clients with a concise overview and does not replace EWA's complete internal Business Continuity Plan.