

# Business Continuity Plan

Evolve Wealth Advisors LP (EWA) is committed to providing timely service to our clients. Part of that commitment is preparing for the worst: disasters that are outside of our control that may impact our ability to provide you with exceptional service. EWA has taken deliberate and considered steps to prepare for disaster recovery and business continuity under a variety of potential scenarios, all with the goal of protecting our clients and providing you with timely and effective services. We continue to assess and update our continuity plans to provide for recovery and timely resumption of critical business operations in a way that minimally impacts our clients.

## **EWA Preparedness**

Our client's accounts are custodied with Charles Schwab & Co., Inc. (Schwab). You can find Schwab's Business Continuity Plan Summary on Schwab's website located [here](#).

If EWA loses the ability to perform business at any of our office locations, we have enabled our advisors and staff to work either at alternate locations or remotely through secure cloud-based services. Our plan ensures the safeguarding of client information and protection of our books and records. Again, if the unexpected were to happen, our goal is to restore services as quickly as possible and provide our clients with the timely and exceptional service that they have come to expect from us.

EWA will communicate a significant business disruption via our website at [www.evolvewealthadvisors.com](http://www.evolvewealthadvisors.com) or by email from our advisors and staff. Updates on the status of recovery of systems and operations and the implementation of our continuity plans will be communicated promptly on our site. Clients can also contact us directly at (602) 805-5683. Significant business disruptions can vary in scope, from only our office, a building, a city, or the entire region. They can be transitory, short, or long term. Our continuity plan is designed to account for disruptions of various lengths and scopes and to ensure that critical functions are recovered as quickly and securely as possible. If the significant business disruption is so severe that it prevents us from remaining in business, our continuity plan has contemplated that possibility and will assure our clients' prompt access to their funds and securities through our custodian at Schwab.

If you have any questions regarding our business continuity planning and the efforts that we have undertaken to respond to unexpected interruptions in service, please do not hesitate to ask us. We are always happy to discuss how we strive to serve our clients.