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March 1, 2022

Dear Client,

We hope this letter finds you well. We are writing to let you know that we are entering into an exciting new era at CD Wealth Management. As of today, CD Wealth Management is being acquired by Bluespring Wealth Partners, LLC, with the goal of building upon our existing strengths as an organization to establish a preeminent wealth-management hub in North Texas.

There will be no changes to how we work with you, and no action is needed from you.

The company will continue doing business under the CD Wealth Management name, and our founder and partners will maintain a significant equity interest in the underlying company. We will remain committed to — and wholly focused on — servicing our clients' needs. Our leadership team of Scott Cohen, Andy Dropkin and Ilona Friedman, along with the rest of the CD Wealth team that you have worked with for years, will continue to drive the business.

Bluespring is a wholly owned subsidiary of Kestra Financial, Inc., which has provided our brokerage and advisory platform since our founding. By aligning with Bluespring, we will gain access to deep industry know-how, resources and innovation designed to enhance our client service. Bluespring's back-office support will allow us to devote more time to working directly with you.

Bluespring's unique strategy of empowering best-in-class wealth management firms like ours to build upon their existing strengths, rather than conform to an alternative model, was incredibly appealing to us. As Bluespring continues to expand its nationwide footprint, CD Wealth will be a critical hub for growth in Texas and beyond.

We are excited about the opportunities this partnership brings and the positive impact it will have on our ability to deliver wealth planning that transforms your life.

If you have any questions, please feel free to reach out to us directly. We always value the privilege of speaking with our clients, and we want to thank you for letting us work with you to build and secure your financial dreams.

Relationships and trust are the foundation of our business, and we are grateful to share both with you.

Sincerely,

Handwritten signature of Scott Cohen in black ink.

Scott Cohen
Principal, Founder,
Chief Executive Officer

Handwritten signature of Andy Dropkin in black ink.

Andy Dropkin
Managing Director,
Chief Investment Officer

Handwritten signature of Ilona Friedman in black ink.

Ilona Friedman
Managing Director,
Chief Wealth Management Officer