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Frequently Asked Questions (FAQs)

Why did you pursue this partnership with Bluespring Wealth Partners?

We see great opportunities in adding the capabilities that Bluespring provides to our suite of services at CD Wealth Management. Bluespring will provide us the opportunity to add expertise in estate and tax planning, more research tools and resources, access to capital and additional layers of institutional support. Bluespring is making similar acquisitions to create regional hubs around the country. Because Bluespring recognizes the high level of service we provide our clients, the exceptional growth we have enjoyed year after year and the opportunities that exist in our region, we will be at the front of those efforts in Texas.

What will change about my portfolio, my accounts or how CD Wealth manages my money?

Nothing. CD Wealth will continue to operate as an independent company, and we will continue to manage your portfolio with the same tried-and-true practices we always have employed. Founder and CEO Scott Cohen will continue to lead the company. National Financial Services, LLC, a Fidelity subsidiary, will continue to serve as the clearing and custody platform for your accounts, charged with the safekeeping and delivery of your securities and funds. Likewise, Kestra Financial will continue to serve as our brokerage and advisory platform.

Will I see any change in my relationship with my team at CD Wealth?

No. Our entire team will remain intact, and our leadership group is committed to a seamless integration and the high level of service and support we provide. 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. One of the benefits of aligning with Bluespring is that Scott Cohen, Andy Dropkin, Ilona Friedman and all of our team members will be even more available to assist you on an individual basis because the team will be able to rely on Bluespring's back-office support.

Will your investment philosophy change?

No. We will continue to utilize the same strategies we have always used, starting with understanding the investment objectives and risk tolerance of each client. Regarding investments, we believe in diversification and having different asset classes that allow you to stay invested. We believe the best option is to stick with a broadly diversified portfolio that can help you achieve your own specific financial goals — regardless of market volatility. Our philosophy remains the same: Long-term fundamentals are what matter.

Will this change anything about our fee structure?

No. Your fee structure will remain unchanged. We believe strongly that the interests of our clients come before our own. We will continue to be transparent about our fees and our actions.

Why is Bluespring the right fit for CD Wealth?

We have a long-standing working relationship with Bluespring's parent company, Kestra Financial, which provides the brokerage and advisory platform we use. Our leadership team has had personal and professional relationships with their management team for decades, and both companies share a similar vision, mission and integrity. We would not have entered into a similar arrangement with another company; our relationship with Kestra is built on a foundation of trust and shared principles — allowing us to enhance what we love to build most: wealth planning designed to transform your life.