

ACH Authorization

Evergreen Wealth provides a "Transfer Funds" feature for my account (whether individual or joint) that allows me to electronically transfer funds between my eligible Evergreen Wealth accounts, and my external accounts at other financial institutions ("External Accounts"), once I register my External Accounts with Evergreen Wealth. These transfers of funds are referred to as "ACH Transactions," and include:

- One-time transfers that allow me to initiate separate one-time individual transfers based on date and dollar amount I request; and
- Recurring transfers that allow me to initiate repeat transfers of a set dollar amount at regular intervals.

I acknowledge the terms of the Transfer Funds feature and the terms of my other agreements with Evergreen Wealth. I authorize Evergreen Wealth to initiate electronic credit/debit ACH Transactions to my eligible Evergreen Wealth Accounts and each External Accounts that I have registered with Evergreen Wealth. If any transfer date falls on a weekend or bank holiday, I agree that the transfers may be executed on the next business day, or as soon as reasonably possible at the discretion of Evergreen Wealth.

I represent and warrant that I have all necessary right, power, and authority to debit and credit my Evergreen Wealth Accounts and any External Accounts that I have registered with Evergreen Wealth, and that all information or instructions that I provide to Evergreen Wealth in relation to any funds transfers is complete and accurate, and my authorization complies with all applicable law.

I acknowledge that the creation of ACH transactions (known as "origination") must comply with the provisions of applicable law and the rules of the National Automated Clearing House Association (NACHA). I request the financial institution that holds my External Accounts to honor all transfers initiated in accordance with this authorization form.

Should an incorrect amount be withdrawn from or deposited to my External Accounts or my Evergreen Wealth Accounts, I authorize Evergreen Wealth to correct the error by debiting/crediting my External Accounts or my Evergreen Wealth Accounts.

This authorization remains in effect until terminated by giving written notice to Evergreen Wealth (clientservice@evergreenwealth.com). For Preauthorized Transfers, I understand that it is my responsibility to contact Evergreen Wealth to stop or cancel a Preauthorized Transfer at least three (3) business days prior to the scheduled payment. I will follow the directions in the Evergreen Wealth App to stop or cancel a Preauthorized Transfer.

For joint accounts, each joint account holder may independently authorize ACH transactions. All joint account holders are jointly and severally liable for all ACH transfers initiated by any account holder.

For individual accounts, a revocation of this authorization will terminate this authorization for that account. For joint accounts, a revocation by any one joint account holder will apply to the joint account as a whole, unless otherwise specified in writing by all account holders and Evergreen

I AGREE TO PRINT THIS ACH AUTHORIZATION AND RETAIN A HARD COPY OR SAVE AS AN ELECTRONIC COPY. CUSTOMER SIGNATURE COLLECTED ELECTRONICALLY VIA CHECKBOX.