

**Planning Grounds, L.L.C.**  
**Provided by Blakely Walters**  
3333 North Hayden Road  
Scottsdale, AZ 85251

**Participant Acknowledgment & Agreement**

Planning Grounds, L.L.C., an Arizona limited liability company (“Planning Grounds”), provides qualified financial professionals from the Planning Grounds network of financial professionals to consult with you as an optional benefit to you as an employee of Honor Health (“Employer”). Financial Professional asks that we disclose to you the nature of our arrangements with Financial Professional.

Financial Professional’s consultation with you will be educational only, and will include:

- (1) Up to Three one-hour in-person meetings year one, and two annual meetings thereafter;
- (2) Access to the Financial Professional by email and telephone during regular business hours;
- (3) Creation and management of a transferable electronic financial record; and
- (4) Additional consultation as reasonably requested by you (“Participant Services”).

The Financial Professional (Blakely Walters) will provide detailed financial analysis to educate you and encourage you to achieve your financial objectives. Information not disclosed to the Financial Professionals may directly impact the suitability, accuracy, or effectiveness of specific recommendations given.

**The Participant Services create neither a client/broker relationship, nor an investment advisory relationship between you and the Financial Professional.**

**The cost for this optional benefit is \$10 per pay-period with a minimum of a one-year commitment. There is a one-time initial 30-day period in which you can elect to drop the benefit otherwise it will continue for at least 24 pay-periods at which time it will be available for renewal or cancelation.**

Planning Grounds has an arrangement with Financial Professional (Blakely Walters) under which Planning Grounds refers participants (i.e. prospective clients) to Financial Professional and pays the Financial Professional on a per meeting basis. In exchange for referring prospective clients, and compensation per meeting Financial Professional waives its regular fees and provides the Participant Services at no additional cost. Planning Grounds is compensated for managing Financial Professional.

In addition, Planning Grounds is not authorized to provide investment advice on behalf of Financial Professional or to act for or bind Financial Professional. **If you desire to form an investment advisory relationship or broker/agent relationship, you must review and sign a separate written agreement. No investment advisory agreement or broker/agent agreement with Financial Professional will become effective until accepted by Financial Professional.**

**By signing below, you acknowledge that Employer is in no way endorsing or providing to you investment advisory services, client/broker services, financial products, or financial services. You acknowledge that no fiduciary relationship exists between you and Employer as a result of providing this benefit to you. If a fiduciary relationship is found to exist, you hereby waive that relationship in consideration of the services provided to you. You also agree to an auto-deduction of \$10 per pay period for access to above service(s).**

“Participant”

Employee Number

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Please submit this completed form to [info@blakelywalters.com](mailto:info@blakelywalters.com)

Contact phone: (480) 776-5897