



# Reduced Minimum Digital Asset Investment Promotion: Terms & Conditions

This limited-time promotion allows eligible clients to open an advisory account with Digital Wealth Partners (“Adviser”) with a minimum digital asset portfolio value of \$100,000, reduced from the Adviser’s standard minimum portfolio value of \$500,000.

## Promotion Terms

- This promotion is available for a limited 30-day promotional period, unless modified or terminated by the Adviser in its sole discretion.
- To qualify for this promotion, a client must execute an Investment Advisory Agreement and initiate the account opening process during the promotional period.
- The client must fund the account with at least \$100,000 in eligible digital assets within thirty (30) days of executing the Investment Advisory Agreement.
- Portfolio value will be determined based on the USD equivalent value of eligible digital assets under management as reasonably determined by the Adviser using prevailing market pricing.
- Advisory fees will apply to all assets under management in accordance with the fee schedule outlined in the Investment Advisory Agreement. This promotion does not modify or waive the Adviser’s standard advisory fees.
- This promotion only modifies the minimum portfolio value requirement and does not alter any other terms of the Investment Advisory Agreement.
- All client accounts remain subject to the Adviser’s standard onboarding, custody, compliance, and suitability review procedures.
- Assets must be eligible for custody with the Adviser’s designated custodian(s).
- If the account is not funded within the required 60-day period, the Adviser may decline to open the account or require the standard \$500,000 minimum portfolio value.



- This promotion may not be combined with other promotional offers unless approved by the Adviser.
- The Adviser reserves the right to modify or terminate this promotion at any time.

*Digital Wealth Partners is an SEC-registered investment adviser. Registration does not imply a certain level of skill or training. Digital assets involve significant risk, including volatility, liquidity risk, regulatory uncertainty, and the potential loss of principal. Past performance is not indicative of future results. This communication is provided for informational purposes only and does not constitute investment advice, a recommendation to buy or sell any security or digital asset, or an offer to enter into an advisory relationship. Advisory services are offered only pursuant to a written Investment Advisory Agreement. Eligibility for this promotion is subject to the Adviser's onboarding procedures, suitability review, and acceptance of the client account. Additional terms and conditions may apply.*