



HARBOUR INVESTMENTS, INC. ASSET MANAGEMENT ADDENDUM

THIS ADDENDUM is entered into this _____ day of _____, 20 ____ by and between Harbour Investments, Inc., (“HII”) a Wisconsin Corporation (Advisor) and (Client) _____.
(Type or Print Clearly Client Name)

This Addendum is for the purpose of adding or deleting assets and/or changing the fee structure paid for advisory services provided by the Advisor as indicated in the Harbour Investments, Inc. (HII) Asset Management Services Agreement (“Agreement”) or Third-Party Manager Program Services Agreement. All statements and provisions set forth in the most recently executed Agreement shall apply to all current and any new account (s) being added including the calculation of management fees unless otherwise updated using this addendum. Any update to the fee schedule will take effect upon execution by both parties.

Section 1 ADDING / DELETING ASSETS UNDER MANAGEMENT

The account(s)/assets listed below are to be added/deleted to/from the calculation of Assets Under Management. I/we understand fee(s) will be deducted from the following account(s) unless indicated below:

	Custodian/Program/ Platform Name(s)	Account Number	Client Name & Account type	Current Value
__ Add or __ Delete				
__ Add or __ Delete				
__ Add or __ Delete				
__ Add or __ Delete				
__ Add or __ Delete				

Section 2 CHANGE OF ADVISORY SCHEDULE / FEE AUTHORIZATION

Account Number(s): _____

I/we understand that any advisory account(s) listed above WILL be affected by the advisory fee and/or billing frequency change listed below.

Annual Fee Amount: % of AUM or Flat \$ Amount	Frequency of Billing: Quarterly / Monthly	Advance or Arrears	Ticket Charges (TC) bill to (Advisor or Client)	Trading Fees- (if ABF ² submit addendum)
				Ticket Charges

²Asset-based Fee

SPECIAL INSTRUCTIONS: (Master billing, Advisory VA, excluded assets, other...)

DISCRETIONARY TRADING AUTHORIZATION

This agreement authorizes the IAR as the agent and attorney-in-fact (the "Agent"), with full power and authority to buy, sell (including short sales and liquidations), exchange, convert and otherwise trade in stocks/ETFs (non-penny stock), options, UITs, bonds, municipal bonds, mutual funds, CDs and US Treasury instruments whether directly or indirectly through investments in managed investment products on margin or otherwise, in one or more accounts maintained through Harbour Investments, Inc.

In all such transactions, Harbour is hereby authorized to follow the instructions of the Agent; the Agent is authorized to act on behalf of the client(s) in the same manner and with the same force and effect as the undersigned might or could with respect to such transactions, the making and arranging deliveries and with respect to all other things necessary or incidental to the furtherance and/or conduct of the account. This authorization does not grant IAR permission to take delivery or possession of the client's funds or securities. This authorization is a continuing one and shall remain in full force and effect until revoked by the client(s), or an authorized person on the client(s) behalf, or by the IAR pursuant to the provisions of this agreement. This Authorization shall automatically terminate upon the death of the client(s). The provisions hereof shall be in addition to and in no way limit or restrict any right which Harbour may have under any agreement with the client(s). Each of the client(s) hereby agrees to the terms and conditions as set forth in this Discretionary Trading Authorization. This Discretionary Trading Authorization / Power of Attorney shall be construed according to the laws of the State of Wisconsin.

If the client has previously granted discretionary authorization to the IAR as the agent and attorney-in-fact (the "Agent"), with full power and authority then discretion will be authorized for the account(s) being added to the agreement. If no previous authorization has been granted it will be granted with this agreement. If discretionary authorization is desired for Alternative/Limited Liquidity Products the client will complete the Discretionary Trading Authorization form.

DISCRETIONARY TRADING:

The IAR will manage the client's advisory account(s) on a discretionary basis and have limited power of attorney to execute transactions on behalf of the client(s) without obtaining the client(s) consent prior to every transaction. This authority is limited to performing transactions in the client's managed account(s) within the agreement.

CLIENT ACKNOWLEDGEMENT:

By checking the checkbox as part of the digital account opening process, I/we acknowledge that this Addendum shall become part of the original HII Agreement and fully understand the various provisions set forth as they affect the services rendered by HII and the parties hereto. I/we hereby make the following representations about informed consent of the receipt of certain information from Harbour: I (we) acknowledge receipt of Harbour's Form CRS and understand its contents. I (we) agree to receive, and have received, delivery of Harbour's Best Interest Disclosure by visiting <https://harbourinv.com/clients/regulation-bi/>.

ADVISORY REPRESENTATIVE:

 IAR Name

 IAR Number