



BUSINESS CONTINUITY PLANNING DISCLOSURE

As Of: 29 August 2025

Coordinated Planning has developed a Business Continuity Plan on how we will respond to events that significantly disrupt our business. Since the timing and impact of disasters and disruptions is unpredictable, we will have to be flexible in responding to actual events as they occur. With that in mind, we are providing you with this information on our business continuity plan.

Contacting Us – If after a significant business disruption you cannot contact us as you usually do at (402) 682-8770, you should visit our website, www.coordplan.com to see if we have posted alternative contact numbers and methods. At any time, our clients can contact Valmark (800) 765-5201. Valmark will be able to assist our clients in facilitating trades or any other securities transactions.

If for some reason Valmark is not available, please contact the custodian where your account is held. This will most likely be either Schwab (800) 435-4000 or Pershing (201)-413-3333. Your custodian is listed on your account statement. If you have an account held directly with another custodian or with an insurance company, please reach out to the numbers listed on your account statement.

Our Business Continuity Plan – We plan to quickly recover and resume business operations after a significant business disruption and respond by safeguarding our employees and property, making a financial and operational assessment, protecting the firm's books and records, and allowing our customers to transact business. In short, our business continuity plan is designed to permit our firm to resume operations as quickly as possible, given the scope and severity of the significant business disruption.

Our business continuity plan addresses: data back-up and recovery; all mission critical systems; financial and operational assessments; alternative communications with customers, employees, and regulators; alternate physical location of employees; critical supplier, contractor, bank and counter-party impact; regulatory reporting; and assuring our customers prompt access to their funds and securities if we are unable to continue our business.

Our broker-dealer's clearing firms, Schwab and Pershing, both back up our important records in a geographically separate areas. Records are also maintained by our broker-dealer, Valmark. While every emergency situation poses unique problems based on external factors, such as time of day and the severity of the disruption, we have been advised by our broker-dealer's clearing firms that its objective is to restore its own operations and be able to complete existing transactions and accept new transactions and payments within 4 hours. Your orders and requests for funds and securities could be delayed during this period.

Varying Disruptions – Significant business disruptions can vary in their scope, such as only our firm, a single building housing our firm, the business district where our firm is located, the city where we are located, or the whole region. Within each of these areas, the severity of the disruption can also vary from minimal to severe. In a disruption to only our firm or a building housing our firm, we will transfer our operations to a local site when needed and expect to recover and resume business within the same business day. In a disruption affecting our business district, city, or region, we will transfer our operations to a site outside of the affected area, and recover and resume business within ten business days. In either situation, we plan to continue in business, transfer operations to our broker-dealer if necessary, and notify you through our website regarding how to contact us. If the significant business disruption is so severe that it prevents us from remaining in business, we will communicate with our customers regarding how to promptly access their funds and securities.

For more information – If you have questions about our business continuity planning, you can call our operations department at (402) 682-8770 or contact us through our website at www.coordplan.com.