



## **Termination of Advisory Agreement Effective September 30, 2025**

Dear [Client Name],

*(This communication is a duplicate of an email sent on 8/28.)*

Thank you for the trust you've placed in Goodwin Investment Advisory. We never take that lightly. It has been a privilege to partner with you on your financial journey, and I'm grateful for your relationship with our team.

Since founding GIA in 2004, I've remained committed to serving clients with integrity, transparency, and excellence. While the firm has evolved significantly over the years by providing comprehensive financial planning and growing our team and capabilities, we've remained intentional about keeping our fees reasonable and aligned with the value we provide.

At the end of March, we first reached out regarding an update to our Client Advisory Agreement and fee schedule, effective October 1, 2025. We have followed up several times since, but unfortunately, we have not received any response or signed agreement from you. *Without a signed agreement, we are legally unable to continue providing services.*

As a result, we will be **terminating our Client Advisory Agreement and ending our access to your accounts as of September 30, 2025**. A copy of the updated Client Advisory Agreement is enclosed for your reference, along with this formal termination letter. Your accounts will remain at Fidelity and remain invested as they are now. You will need to contact Fidelity regarding your accounts after September 30, 2025. ([www.fidelity.com](http://www.fidelity.com); 1-800-343-3548)

If you wish to remain a client, sign the enclosed agreement and mail it back within seven days, or contact our office and we will gladly re-send the agreement via DocuSign or assist you by phone until September 30, 2025.

We truly value the opportunity we've had to work with you, and we wish you the very best in your continued financial journey.

With appreciation,  
Tim Goodwin  
Founder & CEO  
Goodwin Investment Advisory

Email:

Hi [Client Name],

Thank you for the trust you've placed in Goodwin Investment Advisory. It's been a privilege to partner with you on your financial journey.

We initially reached out at the end of March about signing the updated Client Advisory Agreement and fee schedule, effective October 1, 2025, and have followed up several times since. Unfortunately, we haven't received a response or signed agreement from you.

Without a signed agreement, we're legally unable to continue providing services. As a result, your Advisory Agreement will end and account access will be terminated on **September 30, 2025**. Your accounts will remain at Fidelity and remain invested as they are now. You will need to contact Fidelity regarding your accounts after September 30, 2025. ([www.fidelity.com](http://www.fidelity.com); 1-800-343-3548)

If you wish to remain a client, please contact our office right away. We can re-send the DocuSign or assist you by phone to complete the agreement before the deadline.

We truly appreciate the opportunity we've had to work with you and wish you the very best moving forward.

With appreciation,

Tim Goodwin

Founder & CEO

Goodwin Investment Advisory