

## Business Continuity Plan (BCP) Disclosure Statement

EQUIPOISE Wealth Management, Inc. has developed a Business Continuity Plan outlining how we will respond to events that significantly disrupt business. Since the timing and impact of disasters and disruptions is unpredictable, EQUIPOISE will have to be flexible in responding to actual events as they occur. With that in mind, I am providing you with information that you may find useful.

1. If you can not reach me at the office (303-765-4422), you may call my cell phone (303-437-8586) or email me at [susan@EquipoiseWealth.com](mailto:susan@EquipoiseWealth.com).
2. If you are unable to reach me, then contact my daughter, Seana O'Grady, at 720-838-3249 or at [seanamo@comcast.net](mailto:seanamo@comcast.net).
3. If you are unable to reach me regarding investment issues, and your account(s) are held by Schwab Institutional, call 800-626-0026 option 6.
4. If you are unable to reach me and your accounts are not held by Schwab Institutional, call the respective broker/dealer, mutual fund family, or investment representative for assistance.

EQUIPOISE expects to quickly recover and resume business operations after a significant business disruption. We will safeguard employees' lives, as well as client and firm property. Further, we will protect to the extent feasible, the firm's books and records. In short, our Business Continuity Plan is designed to permit EQUIPOISE Wealth Management, Inc. to resume operations as quickly as possible, given the scope and severity of the business disruption.

If you have any questions regarding our Business Continuity Plan, please contact me at 303-765-4422.