

EarlyBird Incomplete Account Holiday 2023 Challenge

Set up a recurring investment of \$15 and earn a \$50 matched investment + a month free of EarlyBird.

The Reward

When an EarlyBird Customer who does not currently have a recurring investment set up, sets a \$15 or more recurring monthly investment on a complete and verified EarlyBird account during the promotional period (December 4th – December 31st, 2023), in accordance with the eligibility criteria below, the customer will be earn an EarlyBird match on their monthly investment of \$50 into their child's account. Limit one entry per child. The EarlyBird matched investment will be given by February 29th, 2024.

Eligibility

You are eligible to receive this automatic entry if your recurring investment completes successfully. Anyone who earns an entry under this promotion will only receive such reward if their EarlyBird account is in good standing with EarlyBird at all times between meeting the eligibility criteria and the time the reward is issued. EarlyBird defines an account in good standing as an EarlyBird user that has not been suspended, had suspicious or fraudulent activity within their account, as determined by EarlyBird and recent transactions have not failed. If you close your EarlyBird account or make it known that is your plan of action on or before 1/29/2024, make any investment that results in returned funds, or make a withdrawal transaction of funds, you will not qualify for this promotion. **Users will no longer be eligible for this investment boost offer if their recurring investments result in returned funds/failed or make a withdrawal on matched funds.** This promotion is available one time per child, and is only available for the named recipient of the Incomplete Account Holiday Challenge email.

Important Disclosures and Additional Information

This promotion is a limited time offer. Advisory services are offered by EarlyBird Central Inc. ("EarlyBird"), an SEC-registered investment advisor. Investing involves risk and investments may lose value, including the loss of principal. Please consider your objectives, risk tolerance, and EarlyBird's fees before investing. Past performance is not a guarantee of future results. EarlyBird reserves the right to restrict, revoke or change this offer at any time at its discretion. EarlyBird may provide other offers to other customers during the same promotional period. EarlyBird is not responsible for any failure on your part to maintain your account in good standing or otherwise meet the eligibility requirements for this promotion. For the avoidance of doubt, if either you or the customer to whom you send a gift(s) is ineligible for the reward under this promotion, you will not receive the reward. Rewards are made at the sole discretion of EarlyBird.