

## **Alinea Invest, Inc. Payment Terms & Conditions**

By electing to receive services through Alinea, you agree to pay the Alinea Fee associated with the applicable platform service. You may elect to pay your Alinea Fee on a monthly basis in advance ("Monthly Payment") or on a yearly basis in advance ("Yearly Payment"), in each case subject to these Terms and as further described below.

You agree and acknowledge that you are responsible for paying any and all fees, including, without limitation, the Alinea Fee, that you owe pursuant to these Terms and the Advisory Agreement. You are responsible for maintaining complete and accurate billing and contact information with Alinea. You acknowledge that such fees may change from time to time and will be available on the Alinea Website, [www.alinea-invest.com](http://www.alinea-invest.com) (the "Website") and in the Advisory Agreement. In the event of a change in fees, Alinea will provide you notice electronically on the Website. You agree to check the Website from time to time for updates to the fees applicable to you. Alinea reserves the right to discount or waive any fees associated with the platform in its sole discretion.

### Monthly Payment

By selecting the option to make a Monthly Payment, you agree to an initial and recurring payment of the Alinea Fee at the then-current Alinea Fee rate applicable to the platform tier service you select, and you accept responsibility for all recurring charges prior to cancellation, including where applicable any charges processed by Alinea after the expiration of your payment card. Once you select the option to make a Monthly Payment, Alinea will automatically renew your Monthly Payment for each successive monthly period. Alinea will continue to automatically process your Monthly Payment each month and you will be charged for each successive monthly period at the then-current Alinea Fee rate until your account is closed and the service is canceled.

### Yearly Payment

By selecting the option to make a Yearly Payment, you agree to make an initial pre-payment for twelve (12) months in full and in advance of the Alinea Fee at the then-current Alinea Fee rate applicable to the Platform Tier Service you select, and you accept responsibility for all recurring charges until you cancel your Platform Tier Service. After one (1) year, and yearly thereafter, you will be automatically billed a recurring Yearly Payment renewal fee for twelve (12) months in full and in advance at the then-current Alinea Fee rate applicable to the Platform Tier you have selected. We will notify you before the Yearly Payment renewal fee is billed. Alinea will continue to automatically process your Yearly Payment each year for twelve (12) months in full and in advance at the then-current Alinea Fee rate until your account is closed and the service is canceled.

## Payment Terms

With respect to a Platform Tier Service, you agree that once you have expressly agreed for your Alinea Fee to be charged on a recurring basis, and agreed to the amount of the recurring charges, Alinea may submit periodic charges (e.g., monthly or yearly) to your eligible payment method without further authorization from you, until you provide prior notice at any time that you wish to terminate the authorization or to change your payment method. You agree that such notice will not affect charges submitted before Alinea reasonably could act.

## Account Closure and Refunds

To close one or more of your Alinea Accounts, and/or your Platform Tier Service (if applicable) at any time, you may (i) contact Alinea in the customer support chat, or (ii) send an e-mail to [info@alinea-invest.com](mailto:info@alinea-invest.com). Alinea may close one or more of your Alinea Accounts, and/or your Platform Tier Service (if applicable) at any time for any reason by sending you a notice of termination by e-mail, by mail or other means of notification via the Platform.

Unearned pre-paid fees will be calculated and refunded based upon the number of days remaining in the applicable billing month (e.g., the number of days remaining in the calendar month in which the Alinea Account is closed or Platform Tier Service is cancelled) and any whole months that remain prepaid. The number of days in each billing period in respect of which payment is being made is calculated on the basis of a year of 360 days with 12 30-day months.

## Payment Methods

You may elect to pay your Monthly Payment or Yearly Payment from one of either your Alinea Account or your Funding Account.

### i. Payment via Alinea Account or Funding Account

Alinea generally deducts the Alinea Fee from either the free cash balance in your Alinea Account or from your Funding Account; however, Alinea may, as necessary and in its sole discretion, sell securities in your Alinea Account to generate free cash in order to deduct the Alinea Fee.

If all eligible payment methods you provide are declined for payment of your Alinea Fee, you must provide us a new eligible payment method promptly or your payment will be canceled. If you provide us with a new eligible payment method and are successfully charged, your Platform Tier Service renewal date will be based on the original renewal date and not the date of the successful charge.