MARATHON
STRATEGIC ADVISORS, LLC
Fee-Only Investment Advisors

INVESTMENT MANAGEMENT AGREEMENT
(DISCRETIONARY)

This is an agreement between Marathon Strategic Advisors, LLC, a Pennsylvania limited liability company ("Adviser"), and ("Client"). By this agreement, Client retains Adviser to provide investment management services to Client on the following terms:

Section 1. *Investment Management Services.* Adviser will direct, in Adviser's sole discretion and without first consulting Client, the investment and reinvestment of the assets in Client's account(s) at the Custodian as defined below, (the "Account") in securities and cash or cash equivalents. The initial Account assets are listed on Schedule A. Subject to Section 4 of this Agreement, Adviser will subsequently provide Client quarterly and annual electronic statements of the assets in Client's Account. Client's financial circumstances, investment objectives and any special instructions or limits that Client wishes Adviser to follow in managing the Account are (optionally) described in the Client's Questionnaire, attached as Schedule B. Client agrees to notify Adviser promptly of any significant change in the information provided by the Client on Schedule B or any other significant change in Client's financial circumstances or investment objectives that might affect the manner in which Client's Account should be managed. Client also agrees to provide Adviser with such additional information as Adviser may request from time to time to assist it in managing the Account.

Section 2. *Selecting a Broker.* The Client hereby directs that transactions for the Account should be executed through **.** (the "Directed Broker"). In selecting the Directed Broker, the Client has the sole responsibility for negotiating commission rates and other transaction costs with the Directed Broker. Although Client has selected a Directed Broker, Client agrees that Adviser will not be required to effect any transaction through the Directed Broker if Adviser reasonably believes that to do so may result in a breach of its duties as a fiduciary. Client understands that by instructing Adviser to execute all transactions on behalf of the Account through the Directed Broker, a disparity may exist between the commissions borne by the Account and the commissions borne by Adviser's other clients that do not direct Adviser to use a particular broker-dealer. Client also understands that by instructing Adviser to execute all transactions on behalf of the Account through the Directed Broker, Client may not necessarily obtain commission rates and execution as favorable as those that would be obtained if Adviser was able to place transactions with other broker-dealers. Client also may forego benefits that Adviser may be able to obtain for its other clients through, for example, negotiating volume discounts or block trades.

If the Account is maintained on behalf of a plan subject to the Employee Retirement Income Security Act of 1974 ("ERISA") or similar government regulation, Client represents that the Directed Broker is capable of providing best execution for the Account's brokerage transactions, and that the commission rates that Client negotiated are reasonable in relation to the brokerage and other services received by the plan. Client will monitor the services provided by the Directed Broker to assure that the plan continues to receive best execution and pay reasonable commissions. Client represents that the use of the Directed Broker is for the exclusive benefit of the plan.

Transactions for each client account generally will be effected independently unless Adviser decides to purchase or sell the same securities for several clients at approximately the same time. Adviser may (but is not obligated to) combine or "batch" such orders to obtain best execution, to negotiate more favorable

commission rates or to allocate equitably among Adviser's clients differences in prices and commissions or other transaction costs that might have been obtained had such orders been placed independently. Under this procedure, transactions will be averaged as to price and transaction costs and will be allocated among Adviser's clients in proportion to the purchase and sale orders placed for each client account on any given day. If Adviser cannot obtain execution of all the combined orders at prices or for transactions costs that Adviser believes are desirable, Adviser will allocate the securities Adviser does buy or sell as part of the combined orders by following Adviser's order allocation procedures.[1]

Client authorizes and directs Adviser to instruct all brokers and dealers executing orders for Client to forward confirmations of those transactions to Custodian (as defined below) and Adviser. If Client wishes, Adviser will instruct the brokers and dealers that execute orders for Client's account to send Client all transaction confirmations. Or, Client may choose not to receive confirmations and instead rely on Client's quarterly statements from the Custodian and the statements Adviser provides, to keep informed of the status of Client's account.

☐ Please check this box if Client does not wish to receive individual confirmations. (Client may change this decision at any time and instruct Adviser, in writing, to have all confirmations sent directly to Client.)

Adviser may give a copy of this Agreement to any broker, dealer or other party to a transaction for the Account, or the Custodian (as defined below) as evidence of Adviser's authority to act for Client.

Section 3. Custodial Arrangements. Custody of Account assets will be maintained with the independent custodian selected by Client and named on Schedule A (the "Custodian"). Adviser will not hold Account assets or accept authority that would result in custody except as permitted under applicable law or regulatory guidance. Client will be solely responsible for paying all fees or charges of the Custodian. Client authorizes Adviser to give Custodian instructions for the purchase, sale, conversion, redemption, exchange or retention of any security, cash or cash equivalent or other investment for the Account. Client also authorizes and directs Adviser to instruct Custodian on Client's behalf to (a) send Client at least quarterly a statement showing all transactions occurring in the Account during the period covered by the account statement, and the funds, securities and other property in the Account at the end of the period; and (b) provide Adviser copies of all periodic statements and other reports for the Account that Custodian sends to Client.

Section 4. Manager Reports. Adviser will provide Client quarterly and annual electronic statements of the assets in Client's Account, the purchase date, the cost, the current market value, and performance data for the period (or since the opening of the Account).

By signing, Client hereby consents to receive via e-mail or other electronic delivery method for various communications, documents, and notifications from Adviser. These items may include but are not limited to: all statements or reports produced by Adviser; trade confirmations; billing invoices; all Form ADV brochures; privacy policy statements; and any other notices or documentation that Adviser chooses to provide on an ongoing or occasional basis. Client agrees to immediately notify Adviser of any changes to Client's e-mail address shown below or other electronic delivery address. At any time, Client can

[1] Allocations will be done as soon as practical and no later than the opening of the market on the next business day. The Advisor will allocate the securities bought or sold among its Clients' accounts based on the following criteria: the cash available, the account's investment objectives, any investment guidelines or restrictions, and the amount and percentage of the securities or similar securities already in the account. The result may be that new accounts or other accounts with available cash receive the first allocation of securities. Whether the price of a security changed between the time of execution and the time of allocation, or the amount of any such change, will not be considered in determining how to allocate any securities transactions. No orders may be aggregated and no allocations of securities shall be made between Access Person Accounts and Client accounts.

provide a written request to have hard copies of some/all applicable documentation provided in addition to the electronic reports.

Section 5. *Management Fees and Payments.* Client will pay Adviser a fee for its investment management services. The fee will be a percentage of the market value of all assets in the Account on the last trading day of each calendar quarter. The fee schedule is set forth in Schedule A. The management fee is payable quarterly in arrears. In any partial calendar quarter, the management fee will be prorated based on the number of days that the Account was open during the quarter. Client understands that Account assets invested in shares of mutual funds or other investment companies ("funds") will be included in calculating the value of the Account for purposes of computing Adviser's fees and the same assets will also be subject to additional advisory and other fees and expenses, as set forth in the prospectuses of those funds, paid by the funds but ultimately borne by the investor. Fees are negotiable.

Client authorizes the Custodian to deduct from Client's Account and pay to Adviser on the submission of a bill the management fee for each calendar year quarter. Adviser will send to Client a quarterly statement showing the amount of the management fee due, the Account value on which the fee is based and how the fee was calculated. Client is responsible for reviewing these statements and promptly contacting Adviser with any questions. The Custodian does not independently verify Adviser's fee calculations. The Custodian will send Client a quarterly statement showing all amounts paid from the Account, including all management fees paid by Custodian to Adviser.

Section 6. *Valuation.* Adviser will value securities in the Account that are listed on a national securities exchange or on Nasdaq at the closing price, on the valuation date, on the principal market where the securities are traded. Other securities or investments in the Account will be valued in a manner determined in good faith by Adviser to reflect fair market value.

Section 7. *Confidentiality.* Except as otherwise agreed in writing or as required by law, Adviser will keep confidential all information concerning Client's identity, financial affairs, or investments. Client acknowledges and agrees that Adviser may, from time to time, use artificial intelligence ("AI") tools to assist in generating written notes and summaries of client meetings or calls. These tools will be used solely for internal documentation and recordkeeping purposes to improve the accuracy and efficiency of Adviser's services. Adviser will not record any audio or video of client conversations. Instead, only real-time text-based assistance may be used to help create written notes during or immediately after the meeting. Adviser will take reasonable measures to ensure that any client information processed by such AI tools is handled in a manner consistent with Adviser's confidentiality and data security obligations under this Agreement.

Section 8. *Other Investment Accounts.* Client understands that Adviser serves as investment manager for other clients and will continue to do so. Client also understands that Adviser, its personnel and affiliates ("Affiliated Persons") may give advice or take action in performing their duties to other clients, or for their own accounts, that differ from advice given to or action taken for Client. Adviser is not obligated to buy, sell or recommend for Client any security or other investment that Adviser or its Affiliated Persons may buy, sell or recommend for any other client or for their own accounts. This Agreement does not limit or restrict in any way Adviser or any of its Affiliated Persons from buying, selling or trading in any securities or other investments for their own accounts.

Conflicts of interest may arise in the allocation of investment opportunities among accounts that Adviser advises. Adviser will seek to allocate investment opportunities believed appropriate for Client's Account and other accounts advised by Adviser among such accounts equitably and in a manner consistent with the best interests of all accounts involved. But, there can be no assurance that a particular investment opportunity that comes to the attention of Adviser will be allocated in any particular manner.

Adviser or its Affiliated Persons may provide services for, or solicit business from various companies, including issuers of securities that Adviser may recommend or purchase or sell for client accounts. In providing these services, Adviser or its Affiliated Persons may obtain material, nonpublic or other confidential information that, if disclosed, might affect an investor's decision to buy, sell or hold a security. Under applicable law, Adviser and its Affiliated Persons cannot improperly disclose or use this information for their personal benefit or for the benefit of any person, including clients of Adviser. If Adviser or any Affiliated Person obtains nonpublic or other confidential information about any issuer, Adviser will have no obligation to disclose the information to Client or use it for Client's benefit.

Section 9. *Risk Acknowledgment.* Adviser does not guarantee the future performance of the Account or any specific level of performance, the success of any investment decision or strategy that Adviser may use, or the success of Adviser's overall management of the Account. Client understands that investment decisions made for Client's Account by Adviser are subject to various market, currency, economic, political and business risks, and that those investment decisions will not always be profitable. Adviser will manage only the securities, cash and other investments held in Client's Account and in making investment decisions for the Account, Adviser will not consider any other securities, cash or other investments owned by Client. Except as may otherwise be provided by law, Adviser will not be liable to Client for (a) any loss that Client may suffer by reason of any investment decision made or other action taken or omitted in good faith by Adviser with that degree of care, skill, prudence, and diligence under the circumstances that a prudent person acting in a fiduciary capacity would use; (b) any loss arising from Adviser's adherence to Client's instructions; or (c) any act or failure to act by the Custodian, any broker or dealer to which Adviser directs transactions for the Account, or by any other third party. The federal and state securities laws impose liabilities under certain circumstances on persons who act in good faith, and therefore nothing in this Agreement will waive or limit any rights that Client may have under those laws.

Section 10. *Retirement or Employee Benefit Plan Accounts.* This Section 10 applies if the Account is for a (a) pension or other employee benefit plan (including a 401(k) plan) governed by the Employee Retirement Income Security Act of 1974, as amended ("ERISA"); (b) tax-qualified retirement plan (including a Keogh plan) under section 401(a) of the Internal Revenue Code of 1986, as amended (the "Code"), and not covered by ERISA; or (c) an individual retirement account ("IRA") under Section 408 of the Code.

If the Account is for a plan subject to ERISA, Client appoints Adviser, and Adviser accepts its appointment, as an "investment manager" for purposes of ERISA and the Code, and Adviser acknowledges that it is a "fiduciary" within the meaning of Section 3(21) of ERISA and Section 4975(e)(3) of the Code (but only with respect to the provision of services described in Section 1 of this Agreement). Adviser represents that it is registered as an investment adviser under the Investment Advisers Act of 1940, as amended (the "Advisers Act") or under the laws of any State.

Client represents that Adviser has been furnished true and complete copies of all documents establishing and governing the plan and evidencing Client's authority to retain Adviser. Client will furnish promptly to Adviser any amendments to the plan, and Client agrees that, if any amendment affects the rights or obligations of Adviser, such amendment will be binding on Adviser only when agreed to by Adviser in writing. If the Account contains only a part of the assets of the plan, Client understands that Adviser will have no responsibility for the diversification of all of the plan's investments, and that Adviser will have no duty, responsibility or liability for Client assets that are not in the Account. If ERISA or other applicable law requires bonding with respect to the assets in the Account, Client will obtain and maintain at its expense bonding that satisfies this requirement and covers Adviser and its Affiliated Persons.

Section 11. *Other Legal Actions*. The Client agrees that Adviser will not advise or act for Client in any legal proceedings, including bankruptcies or class actions, involving securities held or previously held by the Account or the issuers of these securities ("Legal Proceedings").

Section 12. *Proxy Voting*. The Client agrees that (check applicable box):

☐ Adviser ***will vote*** proxies for securities held in the Account **[**in accordance with Adviser's policies regarding proxy voting**]**. Adviser is authorized and directed to instruct the Custodian to forward promptly to Adviser copies of all proxies and shareholder communications relating to securities held in the Account (other than materials relating to Legal Proceedings). Client agrees that Adviser will not be responsible or liable for failing to vote any proxies where it has not received such proxies or related shareholder communications on a timely basis.

☒ Adviser ***will not*** *vote*, or give any advice about how to vote, proxies for securities held in the Investment Account. If the Investment Account is for a pension or other employee benefit plan governed by ERISA, Client directs Adviser ***not*** to vote proxies for securities held in the Account because the right to vote such proxies has been expressly reserved to (check applicable box):

☐ The plan's trustees

☐ The following named fiduciary: _____

Section 13. *Termination*. This Agreement will continue in effect until terminated by either party for any reason upon receipt of 30 days' written notice to the other. Termination of this Agreement will not affect (a) the validity of any action previously taken by Adviser under this Agreement; (b) liabilities or obligations of the parties from transactions initiated before termination of this Agreement; or (c) Client's obligation to pay management fees (pro rated through the date of termination). On the termination of this Agreement, Adviser will have no obligation to recommend or take any action with regard to the securities, cash or other investments in the Account.

Section 14. *Client Authority*. If Client is an individual, Client represents that he or she is of legal age. If Client is a corporation, partnership or limited liability company, the person signing this Agreement for the Client represents that he or she has been authorized to do so by appropriate action. If this Agreement is entered into by a trustee or other fiduciary, the trustee or fiduciary represents that Adviser's investment management strategies, allocation procedures, and investment management services are authorized under the applicable plan, trust, or law and that the person signing this Agreement has the authority to negotiate and enter into this Agreement. Client will inform Adviser of any event that might affect this authority or the propriety of this Agreement.

Section 15. *Death or Disability*. If Client is a natural person, the death, disability or incompetency of Client will not terminate or change the terms of this Agreement. However, Client's executor, guardian, attorney-in-fact or other authorized representative may terminate this Agreement by giving written notice to Adviser.

Section 16. *Binding and Non-Assignable Agreement*. This Agreement will bind and be for the benefit of the parties to the Agreement and their successors and permitted assigns, except that this Agreement may not be assigned (within the meaning of the Advisers Act of 1940 or applicable state securities laws) by either party without the consent of the other party.

Section 17. *Governing Law*. This Agreement will be governed by and construed in accordance with the laws of the State of Pennsylvania.

Section 18. *Notices*. Any notice, advice, report, or other communication required or permitted under this Agreement may be delivered in person, by U.S. mail, overnight courier, facsimile, or electronic

delivery. Electronic delivery may include, without limitation, email, a secure client portal, or an electronic signature platform such as DocuSign. Communications to Adviser will be sent to the mailing or electronic address designated by Adviser, and communications to Client will be sent to the mailing or electronic address provided by Client. Each party will promptly notify the other of any change in its mailing or electronic address.

Section 19. *Miscellaneous.* If any provision of this Agreement is or should become inconsistent with any law or rule of any governmental or regulatory body having jurisdiction over the subject matter of this Agreement, the provision will be deemed to be rescinded or modified in accordance with any such law or rule. In all other respects, this Agreement will continue and remain in full force and effect. No term or provision of this Agreement may be waived or changed except in writing signed by the party against whom such waiver or change is sought to be enforced; provided, however, Adviser shall have the right to amend this Agreement without first obtaining Client's consent to account for changes in regulations or laws applicable to Adviser or Client (any such amendment, a "Regulatory Amendment"). If possible, Adviser will seek to provide Client with at least 30 days written notice prior to the effectiveness of any such Regulatory Amendment. Adviser's failure to insist at any time on strict compliance with this Agreement or with any of the terms of the Agreement or any continued course of such conduct on its part will not constitute or be considered a waiver by Adviser of any of its rights or privileges. This Agreement contains the entire understanding between Client and Adviser concerning the subject matter of this Agreement.

Section 20. *ADV Disclosure.* Client has received and reviewed a copy of Parts 2A, 2B, and 3 of Adviser's Form ADV, as well as a copy of this Agreement. The Client has the right to terminate this agreement without penalty within five business days after entering into the agreement.

Section 21. *Department of Labor PTE 2020-02 Disclosure.* Effective December 20, 2021 (or such later date as the US Department of Labor ("DOL") Field Assistance Bulletin 2018-02 ceases to be in effect), for purposes of complying with the DOL's Prohibited Transaction Exemption 2020-02 ("PTE 2020-02") where applicable, we are providing the following acknowledgment to you.

When we provide investment advice to you regarding your retirement plan account or individual retirement account, we are fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. The way we make money creates some conflicts with your interests, so we operate under a special rule that requires us to act in your best interest and not put our interest ahead of yours. Under this special rule's provisions, we must:

- Meet a professional standard of care when making investment recommendations (give prudent advice);
- Never put our financial interests ahead of yours when making recommendations (give loyal advice);
- Avoid misleading statements about conflicts of interest, fees, and investments;
- Follow policies and procedures designed to ensure that we give advice that is in your best interest;
- Charge no more than is reasonable for our services; and
- Give you basic information about conflicts of interest.

We benefit financially from the rollover of your assets from a retirement account to an account that we manage or provide investment advice, because the assets increase our assets under management and, in turn, our advisory fees. As a fiduciary, we only recommend a rollover when we believe it is in your best interest. Conflicts exist between the interests of the investment adviser or associated person and the interest of the client; the client is under no obligation to act upon the investment adviser's or associated person's recommendation; if the client elects to act on any of the recommendations, the client is under no obligation to effect the transaction through the investment adviser or the associated person.

Client and Adviser have executed this Discretionary Investment Management Agreement on this day of .

CLIENT [2]

Client Name

Signature *Date*

Address

Email Address

Social Security or Tax I.D. Number

Client Name

Signature *Date*

Address

Email Address

Social Security or Tax I.D. Number

ADVISOR

Marathon Strategic Advisors, LLC
Advisor Name

By *Date*

Member

[2] If the Account is administered by one or more fiduciaries, each should sign and indicate the capacity in which he or she is acting. If the account is an IRA, the person signing on Client's behalf represents that he or she is the sponsor of the IRA. If the Account is for a pension or other employee benefit plan, each person signing on Client's behalf represents that he or she is a named fiduciary of such plan.

MARATHON
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SCHEDULE A
INVESTMENT MANAGEMENT AGREEMENT

1. **Account Assets.** The assets that Client wishes Advisor to manage initially are listed on the attached statement; provided, however, Client may instruct Advisor to manage other assets in the future by updating the attached statement and/or providing a limited power of attorney or similar authorization to the Directed Broker and Custodian authorizing Advisor to act on Client's behalf. (Please attach a custodial or other inventory of assets)

2. **Directed Broker and Custodian of Account Assets**. The assets to be managed under this Agreement will be held in a custodial account established by client with:

Name of Custodian	Account Assets and Related Identifying Information
. . . .	As set forth on the attached statement and/or as assigned to an account at the Directed Broker and Custodian in the future in respect of any limited power of attorney or similar authorization provided by Client to Directed Broker and Custodian authorizing Advisor to act on Client's behalf .

3. **Investment Advisory Fees**. Marathon Strategic Advisors, LLC's fees for services provided under this Agreement will be as follows:

Accounts $1,000,000 and Over			Accounts Under $1,000,000		
1.00%	on first	$1,000,000	1.50%	on first	$200,000
0.75%	on next	$4,000,000	1.25%	on next	$300,000
0.50%	on next	$10,000,000	1.00%	on next	$500,000
0.40%	on	$15,000,000+	Above $1,000,000 use other chart		

4. **Signature**

Client's Signature: Date:

Client's Signature: Date:

MARATHON
STRATEGIC ADVISORS, LLC
Fee-Only Investment Advisors

ACKNOWLEDGMENT OF RECEIPT OF FORM ADV PARTS 2A AND 2B, FORM CRS, AND PRIVACY POLICY

The Investment Advisers Act of 1940 and certain state laws require that we make it clear to you that the following obligations are implicit in our relationship with you: (1) we will not assign our agreement to manage your account(s) without your consent; and (2) our compensation from you will not be based on a sharing of capital gains or capital appreciation from your account(s).

Marathon Strategic Advisors, LLC has provided you with its Form ADV Part 2A brochure, applicable Form ADV Part 2B brochure supplement, Form CRS (Form ADV Part 3), and Privacy Policy. These documents are provided for disclosure purposes and are not incorporated into this Agreement. Please review these documents and contact us if you have any questions.

Please sign below to indicate that you have received and read Marathon Strategic Advisors, LLC's Form ADV Part 2A brochure, applicable Form ADV Part 2B brochure supplement, Form CRS, and Privacy Policy provided with this Agreement.

_____
Client Name

_____
Signature *Date*

_____
Client Name

_____
Signature *Date*

MARATHON
STRATEGIC ADVISORS, LLC
Fee-Only Investment Advisors

Privacy Policy

Marathon Strategic Advisors, LLC ("Marathon") respects the privacy of its current and former clients. Federal law requires us to explain how we collect, disclose, and protect your nonpublic personal information ("NPI"). This notice describes Marathon's privacy policies and practices.

Information We Collect
We collect NPI as reasonably necessary to provide investment advisory, financial planning, and related services. This information may include:

- Contact and identification information, including name, address, Social Security number, and date of birth;
- Financial information, including income, assets, liabilities, tax information, account numbers, balances, holdings, transactions, and beneficiary information;
- Estate-planning information, including information concerning wills, trusts, and powers of attorney; and
- Other personal or financial information necessary to provide services or comply with legal and regulatory requirements.

We obtain this information from you; from applications, agreements, questionnaires, correspondence, and other documents; from transactions and account activity; and, with your authorization or as permitted by law, from custodians, financial institutions, professional advisers, service providers, and other sources.

How We Use and Disclose Information
Marathon discloses NPI only as necessary to provide services, conduct its everyday business, carry out your instructions, or comply with applicable law. These disclosures may include those made to:

- Custodians, broker-dealers, banks, and other financial institutions that maintain or service client accounts and transactions;
- Technology, data, recordkeeping, compliance, legal, accounting, auditing, and other service providers;
- Regulators, courts, law-enforcement authorities, and other parties when required or permitted by law; and
- Your accountant, attorney, or another person you authorize.

Service providers that receive NPI are expected to use it only for the services they perform and to maintain its confidentiality, subject to applicable law and contractual arrangements.

No Marketing or Other Non-Exempt Sharing
Marathon does not sell NPI, engage in joint marketing, or provide NPI to mailing-list vendors, solicitors, or other parties for marketing purposes. Marathon does not have affiliates with which it shares NPI and does not disclose or reserve the right to disclose NPI to nonaffiliated third parties outside the exceptions permitted by law.

Protecting Your Information
Marathon maintains administrative, technical, and physical safeguards designed to protect client information. Access is limited to personnel and service providers who need the information for legitimate business purposes. Our safeguards address access controls, secure systems and files, information handling, service-provider oversight, incident response, and proper disposal.

Current and Former Clients
These privacy practices apply to current and former clients. NPI is retained for the periods required by law and is disclosed only as described in this notice.

Opt-Out Rights
Because Marathon does not disclose or reserve the right to disclose NPI in a manner that creates a federal opt-out right, no opt-out election is currently necessary. If our practices change, we will provide an updated notice and an opportunity to opt out before making any affected disclosure, as required by law.

Website Privacy Information
The safeguards and disclosure restrictions described in Marathon's Privacy Policy apply to information collected through our website, together with the provisions below.

Marathon does not collect personal information from individuals who merely visit or browse our website. Personal information is collected when a visitor voluntarily completes a contact form or sends us an email.

E-mail and Website Inquiries
Marathon uses information provided through website forms or email to respond to inquiries, facilitate future correspondence, provide information about our services, maintain records of communications, and comply with applicable legal and regulatory requirements. Information provided in an email message will not be provided to outside unaffiliated parties.

Electronic Client Account Access
Marathon maintains personal client information in the Client Reporting Area to provide online reports, including portfolio appraisals, performance reports, and realized gain and loss statements. To protect the confidentiality of these reports, we request that visitors use a browser that supports 128-bit encryption.

For questions about our Privacy Policy, please call (740) 282-5198, email nterezis@mstrategic.com, or write to us at 103 Brilliant Ave, Suite C, Pittsburgh, PA 15215.