

BentOak Capital Donations & Gifting Philosophy

1. BentOak Capital is deeply committed to the philosophy of giving, driven by our faith and core values.
2. Our altruistic efforts extend beyond our business, impacting the communities we serve.
3. We strategically use donations and gifting to shape societies, transform lives, and foster empathy.
4. We focus our support on underserved youth and education opportunities, Christian-based organizations and projects, and agricultural heritage initiatives.
5. We are making a difference by driving meaningful change through our support for organizations and initiatives that align with our principles.

Key Initiatives:

1. Providing resources and support to underserved youth and education opportunities.
2. Supporting Christian-based organizations and projects.
3. Backing agricultural heritage initiatives.

Please remember that past performance may not be indicative of future results. Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment, investment strategy, or product (including the investments and/or investment strategies recommended or undertaken by BentOak Capital ("BentOak"), or any non-investment related content, made reference to directly or indirectly in this newsletter will be profitable, equal any corresponding indicated historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. Due to various factors, including changing market conditions and/or applicable laws, the content may no longer be reflective of current opinions or positions. Moreover, you should not assume that any discussion or information contained in this newsletter serves as the receipt of, or as a substitute for, personalized investment advice from BentOak. To the extent that a reader has any questions regarding the applicability of any specific issue discussed above to his/her individual situation, he/she is encouraged to consult with the professional advisor of his/her choosing. BentOak is neither a law firm, nor a certified public accounting firm, and no portion of the newsletter content should be construed as legal or accounting advice. A copy of BentOak's current written disclosure Brochure discussing our advisory services and fees is available upon request. **Please Note:** If you are a BentOak client, please remember to contact BentOak, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. BentOak shall continue to rely on the accuracy of information that you have provided or at www.bentoakcapital.com. **Please Note:** IF you are a BentOak client, Please advise us if you have not been receiving account statements (at least quarterly) from the account custodian.