APPLICATION FOR RENTAL

Rental Application for **The Copper**

Notice: All adult applicants (18 years or older) must complete a separate application for rental.

APPLICANT INFORMATION

LAST NAME	FIRST NAME	M.I.	SUFFIX
Browne	Philip	M.	Sr.

SSN	BIRTH DATE	PHONE - TYPE
144-58-****	3/11/1960	(215) 370 - 5862 - Mobile

EMAIL
phil.browne@fsinvestments.com

CURRENT ADDRESS

STREET ADDRESS	CITY	STATE	ZIP
1215 Red Barn Rd	Ambler	PA	19002

DATE IN	DATE OUT	MONTHLY RENT
	current	$0.00 / Mo.

EMPLOYMENT & INCOME INFORMATION

OCCUPATION	EMPLOYER/COMPANY
CFO, Head of Finance and Administration	FS Investments

SUPERVISOR	SUPERVISOR PHONE	SALARY	START DATE
Michael Forman	(215) 298 - 9560	$900,000.00/Yr.	

EMPLOYER ADDRESS	CITY	STATE	ZIP
201 Rouse Blvd	Philadelphia	PA	19112

BACKGROUND INFORMATION

Have you ever filed for bankruptcy?	Have you ever willfully refused to pay rent when due?
NO	NO
Have you ever been evicted from a tenancy or left owing money?	**Have you ever been convicted of a crime?**
NO	NO

SUPPLEMENTAL QUESTIONS

Will the tenant be receiving stove knob covers from property?

☒ Yes, I want stove knob covers or replacement stove knob covers for my stove, even though I do not have a child under age six residing in my apartment.

Window Guards:

☒ No children 10 years of age or younger live in my apartment

Were you referred by a broker?

NO

I (we) have seen the actual apartment for which I (we) are applying?:

NO

Preferred Mailing Address:

1215 Red Barn Rd, Ambler, PA 19002 - US

APPLICATION CONSENT

I hereby warrant that all statements set forth above are true.

I understand that a consumer report and/or an investigative consumer report may be requested in connection with my prospective or continuing housing or guarantor application with **The Copper** through RP On-Site LLC (On-Site). I understand that these reports may include information concerning my character, employment and income verification, general reputation, personal characteristics, public records information, criminal records information, education, qualifications, motor vehicle record, mode of living, credit and indebtedness information, and any other information which may reflect upon my potential for tenancy or guarantor status gathered from any individual, organization, entity, agency, or other source which may have knowledge concerning any such items of information.

I understand that **The Copper** may require income and employment verification in connection with my application. I further understand that income and employment verification require access to my employment, income, and payroll related information. I authorize and consent to the access to, use, and release of such information by On-Site, Trans Union LLC, and other applicable credit bureaus for the purpose of providing the verification services in relation to my application and during the course of any ongoing lease obligation arising from such application.

I understand that if an investigative consumer report is requested about me, I have the right to make a written request to **The Copper**, within a reasonable period of time, for complete and accurate disclosure of the nature and scope of the investigation requested.

I consent to the delivery of all notices or disclosures required by law via any medium so chosen by **The Copper** or On-Site, including but not limited to email or other electronic transmission. I understand that all notices shall be deemed received upon being sent.

By submitting this application, I certify that I have read and fully understand the disclosures and my rights detailed above and authorize On-Site to obtain, for the purpose of determining my eligibility for initial or continued tenancy or guarantor status, a consumer report and/or investigative consumer report and to disclose all information obtained by On-Site to **The Copper**, its affiliates, and assigns now and in the future. I also certify that I have read and fully understand my rights under the FCRA available at https://www.on-site.com/resources/consent/fcraDisclosuresConsent.pdf.

I understand that, upon written request, I will be informed whether or not a consumer report or an investigative consumer report was requested and, if such a report was requested, informed of the name and address of the credit reporting agency that furnished the report. With regard to "investigative consumer reports", I further understand that when I receive the name and address of the consumer reporting agency, I may request a copy of such report by contacting such agency. I acknowledge that I have received and read Article 23-A of the New York Correction Law (https://www.on-site.com/resources/consent/correctionLawArticle23a.pdf)

☒ *Application consent was digitally accepted by Philip M. Browne, Sr. (Guarantor)*

Signed by Philip M. Browne, Sr.
Wed Jun 12 2024 06:01:57 PM EDT
Key: 7F37F6DF; IP Address: 163.116.254.48

Philip M. Browne, Sr. *(Guarantor)* *Date*

The following charge(s) will appear on your card statement as *"ClickPay"*

Application Fee - Charge Details			
Name on Card	**Account Number**	**Reference Number**	**Authorized**
Philip Browne	XXXXXXXXXXXX2955	14714975	$21.50
This card has been authorized for the amount above and will be charged when the application is processed.			

APPLICATION FOR RENTAL

Rental Application for **The Copper**

Notice: All adult applicants (18 years or older) must complete a separate application for rental.

APPLICANT INFORMATION

LAST NAME	FIRST NAME	M.I.	SUFFIX
Browne	Alexander	C.	

SSN	BIRTH DATE	PHONE - TYPE
178-80-****	9/22/2001	(215) 771 - 8116 - Mobile

EMAIL
brownea876@gmail.com

CURRENT ADDRESS

STREET ADDRESS	CITY	STATE	ZIP
3720 Chestnut Street	Philadelphia	PA	19104

DATE IN	DATE OUT	MONTHLY RENT
	current	$3,500.00 / Mo.

EMPLOYMENT & INCOME INFORMATION

OCCUPATION	EMPLOYER/COMPANY
Private Bank Analyst	J.P. Morgan

SUPERVISOR	SUPERVISOR PHONE	SALARY	START DATE
Rachel Bullis	(917) 710 - 4251	$100,000.00/Yr.	

EMPLOYER ADDRESS	CITY	STATE	ZIP
390 Madison Avenue	New York	NY	10017

BACKGROUND INFORMATION

Have you ever filed for bankruptcy?	Have you ever willfully refused to pay rent when due?
NO	NO
Have you ever been evicted from a tenancy or left owing money?	**Have you ever been convicted of a crime?**
NO	NO

SUPPLEMENTAL QUESTIONS

Will the tenant be receiving stove knob covers from property?

☒ Yes, I want stove knob covers or replacement stove knob covers for my stove, even though I do not have a child under age six residing in my apartment.

Window Guards:

☒ No children 10 years of age or younger live in my apartment

Were you referred by a broker?

NO

I (we) have seen the actual apartment for which I (we) are applying?:

NO

Preferred Mailing Address:

3720 Chestnut Street, Philadelphia, PA 19104 - US

Initials: A.B. BC5B2224

APPLICATION CONSENT

I hereby warrant that all statements set forth above are true.

I understand that a consumer report and/or an investigative consumer report may be requested in connection with my prospective or continuing housing or guarantor application with **The Copper** through RP On-Site LLC (On-Site). I understand that these reports may include information concerning my character, employment and income verification, general reputation, personal characteristics, public records information, criminal records information, education, qualifications, motor vehicle record, mode of living, credit and indebtedness information, and any other information which may reflect upon my potential for tenancy or guarantor status gathered from any individual, organization, entity, agency, or other source which may have knowledge concerning any such items of information.

I understand that **The Copper** may require income and employment verification in connection with my application. I further understand that income and employment verification require access to my employment, income, and payroll related information. I authorize and consent to the access to, use, and release of such information by On-Site, Trans Union LLC, and other applicable credit bureaus for the purpose of providing the verification services in relation to my application and during the course of any ongoing lease obligation arising from such application.

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I consent to the delivery of all notices or disclosures required by law via any medium so chosen by **The Copper** or On-Site, including but not limited to email or other electronic transmission. I understand that all notices shall be deemed received upon being sent.

By submitting this application, I certify that I have read and fully understand the disclosures and my rights detailed above and authorize On-Site to obtain, for the purpose of determining my eligibility for initial or continued tenancy or guarantor status, a consumer report and/or investigative consumer report and to disclose all information obtained by On-Site to **The Copper**, its affiliates, and assigns now and in the future. I also certify that I have read and fully understand my rights under the FCRA available at https://www.on-site.com/resources/consent/fcraDisclosuresConsent.pdf.

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☒ *Application consent was digitally accepted by Alexander C. Browne*

Signed by Alexander C. Browne
Wed Jun 12 2024 05:46:12 PM EDT
Key: BC5B2224; IP Address: 73.188.242.156

Alexander C. Browne *(Applicant)* *Date*

The following charge(s) will appear on your card statement as *"ClickPay"*

Application Fee - Charge Details			
Name on Card	**Account Number**	**Reference Number**	**Authorized**
Alexander Browne	XXXXXXXXXXXX7792	14714867	$21.50
This card has been authorized for the amount above and will be charged when the application is processed.			

Initials: A.B. BC5B2224

California Required Notices

This report does not guarantee the accuracy or truthfulness of the information as to the subject of the investigation, but only that it is accurately copied from public records, and information generated as a result of identity theft, including evidence of criminal activity, may be inaccurately associated with the consumer who is the subject of the report.

An investigative consumer reporting agency shall provide a consumer seeking to obtain a copy of a report or making a request to review a file, a written notice in simple, plain English and Spanish setting forth the terms and conditions of his or her right to receive all disclosures, as provided in CA Civil Code Section 1786.26.

This report was prepared using software provided by RP On-Site LLC, which can be contacted at: 2201 Lakeside Blvd., Richardson, TX 75082; 1-877-222-0384; or https://www.on-site.com/request-rental-report-or-submit-dispute/.

Avisos obligatorios en el estado de California

El presente informe no garantiza la exactitud ni la veracidad de la información con respecto al tema de investigación, sino únicamente que es una copia exacta de los registros públicos y es posible que la información generada como consecuencia del robo de identidad, incluidos los registros de antecedentes delictivos, se haya asociado por error con el consumidor objeto del presente informe.

Una agencia de investigación de verificación de crédito proporcionará al consumidor que desee obtener una copia de un informe o que solicite la revisión de un archivo un aviso por escrito en inglés y español, escrito en un lenguaje simple y claro, que establezca los términos y condiciones de su derecho a recibir todas las divulgaciones conforme a la Sección 1786.26 del Código Civil de California.

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Rental Report for Alexander C. Browne

The property's screening criteria result	
PENDING	There is screening pending and no overall recommendation yet. Any scores are preliminary, and do not necessarily reflect the final recommendation.

Score for Alexander C. Browne: 812

		Importance	Result
AI Score		Pass/Fail	
No Credit		Pass/Conditional	
Total annual income to rent ratio exceeds 40.0		Pass/Fail	PENDING
May have been through a bankruptcy		Pass/Fail	
No unpaid rental collections		Pass/Fail	
Employment verification must not be Verified False		Pass/Fail	PENDING
Criminal and Other Public Records: Felony Convictions		Pass/Fail	
Total Considered Felony Convictions	None	Pass/Fail	
Alcohol	None ever	Pass/Fail	
Bad Check	None ever	Pass/Fail	
Criminal Other	None ever	Pass/Fail	
Drug Manufacture Distribution	None ever	Pass/Fail	
Drug Marijuana Use	None ever	Pass/Fail	
Drug Meth Manufacture	None ever	Pass/Fail	
Drug Use	None ever	Pass/Fail	
Fraud	None ever	Pass/Fail	

Government Obstruction	None ever	Pass/Fail	
Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Criminal and Other Public Records: Misdemeanor Convictions		Pass/Fail	
Total Considered Misdemeanor Convictions	None	Pass/Fail	
Alcohol	None ever	Pass/Fail	
Bad Check	None ever	Pass/Fail	
Criminal Other	None ever	Pass/Fail	
Drug Manufacture Distribution	None ever	Pass/Fail	
Drug Marijuana Use	None ever	Pass/Fail	
Drug Meth Manufacture	None ever	Pass/Fail	
Drug Use	None ever	Pass/Fail	
Fraud	None ever	Pass/Fail	
Government Obstruction	None ever	Pass/Fail	
Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Is not a registered sex offender		Pass/Fail	

Credit Quick Summary	
Total annual income (reported by Applicant)	$100,000.00
Total **verified** annual income	Pending
Total **verified** combined annual income to rent ratio	Pending (based on rent of $4,376.54)
Total number of accounts	2
Accounts with no late payments	2 (0 unpaid past due)
Accounts paid 30-59 days past due	0 (0 unpaid past due)
Accounts paid 60-89 days past due	0 (0 unpaid past due)
Accounts paid more than 90 days past due	0 (0 unpaid past due)
Total outstanding balance	$5,292.00 ($0.00 past due)
Outstanding revolving debt	$5,292.00 (32% of limit) ($0.00 past due)
Outstanding loan balance	$0.00 ($0.00 past due)
Bankruptcies, foreclosures, and legal items	0
Collection total balance (includes past due)	$0.00
Rental History records found	0

Identity	From Application	From Equifax
Name:	Alexander C. Browne	ALEXANDER C. BROWNE
SSN:	178-80-****	178-80-****
Birth Date:	9/**/2001	9/**/2001

Addresses	From Application	From Equifax
	3720 Chestnut Street Philadelphia, PA 19104 - US	1215 RED BARN RD. AMBLER, PA 19002 (Applicant) Reported 5/2024

Employment	From Application	From Equifax
Applicant:	Private Bank Analyst J.P. Morgan $100,000.00/Yr. Total annual Income: $100,000.00	

Employment Verifications

From RealPage

Requested For	Employer	Position Held	Annual Salary	Supervisor
Alexander C. Browne Requested Date 6/14/2024	J.P. Morgan	Private Bank Analyst	$100,000.00	Rachel Bullis (917) 710 - 4251
	Results Pending			

Criminal and Other Public Records

Requested For	Location Searched	Period Searched	Requested	Returned
Alexander C. Browne	Multistate Search	6/14/2017 - 6/14/2024	6/14/2024	6/14/2024

Results
No Records Found

National Sex Offender Registry History

Requested For	Date Requested	Date Returned
Alexander C. Browne	6/14/2024	6/14/2024

Results
No Records Found

Restricted Person Search

Requested For	Requested	Returned
Alexander C. Browne	6/14/2024	6/14/2024

Results
No Records Found

Risk Models

From RealPage

Risk Model Name	Score	Score Factors
RealPage AI Score (Applicant)	812	Tradeline scoring Debt-to-income ratio Credit Score Rental Payment History

Description
RealPage AI Score uses machine-learning and data patterns in credit score, debt/liability types, trade lines, rental payment history, and renter behavior to achieve reduced bad debt. The RealPage AI Score range is between 1 and 1000 (the higher the score, the less risky the consumer).

From Equifax

Risk Model Name	Score	Score Factors
Credit Score (Applicant)	763	You have too few credit accounts The date that you opened your oldest account is too recent Total of all balances on bankcard or revolving accounts is too high Too few of your bankcard or other revolving accounts have high limits

Description
This credit score is a widely used risk model that uses credit report data to predict the likelihood of default. The credit score range is between 300 and 850 (the higher the score, the less risky the consumer).

Credit Accounts

From Equifax

Account Name
UBS BANK USA
(Applicant)

Opened	Last Active	30-59	60-89	90+	Past Due	Balance
7/2018	4/2024					$4,892.00

Monthly Payment	High Credit	Type	Comments
$62.00	$15,289.00	REVOLVING	Rate/Status 1: Pays account as agreed

Payment History

0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5/24		3/24		1/24		11/23		9/23		7/23		5/23		3/23		1/23		11/22		9/22		7/22	

Account Name
WAWA/CBNA
(Applicant)

Opened	Last Active	30-59	60-89	90+	Past Due	Balance
10/2018	4/2024					$400.00

Monthly Payment	High Credit	Type	Comments
$29.00	$1,249.00	REVOLVING	CHARGE Rate/Status 1: Pays account as agreed

Payment History

0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5/24		3/24		1/24		11/23		9/23		7/23		5/23		3/23		1/23		11/22		9/22		7/22	

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Rental Report for Philip M. Browne, Sr. (Guarantor)

The property's screening criteria result	
PENDING	There is screening pending and no overall recommendation yet. Any scores are preliminary, and do not necessarily reflect the final recommendation.

Score for Philip M. Browne, Sr. (Guarantor): 800

		Importance	Result
AI Score		Pass/Fail	👍
Total annual income to rent ratio exceeds 80.0		Pass/Fail	PENDING
May have been through a bankruptcy		Pass/Fail	👍
No unpaid rental collections		Pass/Fail	👍
Employment verification must not be Verified False		Pass/Fail	PENDING
Criminal and Other Public Records: Felony Convictions		Pass/Fail	👍
Total Considered Felony Convictions	None	Pass/Fail	👍
Alcohol	None ever	Pass/Fail	👍
Bad Check	None ever	Pass/Fail	👍
Criminal Other	None ever	Pass/Fail	👍
Drug Manufacture Distribution	None ever	Pass/Fail	👍
Drug Marijuana Use	None ever	Pass/Fail	👍
Drug Meth Manufacture	None ever	Pass/Fail	👍
Drug Use	None ever	Pass/Fail	👍
Fraud	None ever	Pass/Fail	👍
Government Obstruction	None ever	Pass/Fail	👍

Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Criminal and Other Public Records: Misdemeanor Convictions		Pass/Fail	
Total Considered Misdemeanor Convictions	None	Pass/Fail	
Alcohol	None ever	Pass/Fail	
Bad Check	None ever	Pass/Fail	
Criminal Other	None ever	Pass/Fail	
Drug Manufacture Distribution	None ever	Pass/Fail	
Drug Marijuana Use	None ever	Pass/Fail	
Drug Meth Manufacture	None ever	Pass/Fail	
Drug Use	None ever	Pass/Fail	
Fraud	None ever	Pass/Fail	
Government Obstruction	None ever	Pass/Fail	
Kidnapping	None ever	Pass/Fail	
Property Destruction	None ever	Pass/Fail	
Property Other	None ever	Pass/Fail	
Property Theft	None ever	Pass/Fail	
Prostitution	None ever	Pass/Fail	
Sex Offense Coerced	None ever	Pass/Fail	
Sex Offense Willful	None ever	Pass/Fail	
Society Other	None ever	Pass/Fail	
Violent Fatal	None ever	Pass/Fail	
Violent Non Fatal	None ever	Pass/Fail	
Weapons	None ever	Pass/Fail	
Wildlife	None ever	Pass/Fail	
Is not a registered sex offender		Pass/Fail	

NOTIFICATION(S)

APPLICANT: Equifax Credit File Frozen
There is a freeze on this credit file, meaning that it is inaccessible unless the applicant contacts the credit bureau to release the freeze. We recommend to release the freeze for at least five days. Once the applicant releases the file, contact us and we will attempt to process the screening report.

Credit Quick Summary	
Total annual income (reported by Applicant)	$900,000.00
Total **verified** annual income	Pending
Total **verified** combined annual income to rent ratio	Pending (based on rent of $4,376.54)
Total number of accounts	5
Accounts with no late payments	5 (0 unpaid past due)
Accounts paid 30-59 days past due	0 (0 unpaid past due)
Accounts paid 60-89 days past due	0 (0 unpaid past due)
Accounts paid more than 90 days past due	0 (0 unpaid past due)
Total outstanding balance	$24,043.00 ($0.00 past due)
Outstanding revolving debt	$24,043.00 (24% of limit) ($0.00 past due)
Outstanding loan balance	$0.00 ($0.00 past due)
Bankruptcies, foreclosures, and legal items	0
Collection total balance (includes past due)	$0.00
Rental History records found	0

Identity	From Application	From TransUnion
Name:	Philip M. Browne, Sr. (Guarantor)	PHILIP BLACK PHILIP BROWNE, SR. PHILIP M. BROWNE
SSN:	144-58-****	144-58-****
Birth Date:	3/**/1960	3/**/1960

Addresses	From Application	From TransUnion
	1215 Red Barn Rd Ambler, PA 19002 - US	1215 RED BARN AMBLER, PA 19002 (Applicant) Reported 10/2003 903 BENTLEY CHALFONT, PA 18914 (Applicant) Reported 7/2002 81 RADCLIFF DOYLESTOWN, PA 18901 (Applicant)

Employment	From Application	From TransUnion
Applicant:	CFO, Head of Finance and Administration FS Investments $900,000.00/Yr. Total annual Income: $900,000.00	

Employment Verifications

From RealPage

Requested For	Employer	Position Held	Annual Salary	Supervisor
Philip M. Browne, Sr. (Guarantor) Requested Date 6/14/2024	FS Investments **Results** Pending	CFO, Head of Finance and Administration	$900,000.00	Michael Forman (215) 298 - 9560

Criminal and Other Public Records

Requested For	Location Searched	Period Searched	Requested	Returned
Philip M. Browne, Sr. (Guarantor)	Multistate Search	6/14/2017 - 6/14/2024	6/14/2024	6/14/2024

Results
No Records Found

National Sex Offender Registry History

Requested For	Date Requested	Date Returned
Philip M. Browne, Sr. (Guarantor)	6/14/2024	6/14/2024

Results
No Records Found

Restricted Person Search

Requested For	Requested	Returned
Philip M. Browne, Sr.	6/14/2024	6/14/2024

Results
No Records Found

Risk Models

From RealPage

Risk Model Name	Score	Score Factors
RealPage AI Score (Applicant)	800	Tradeline scoring Debt-to-income ratio Credit Score Rental Payment History

Description
RealPage AI Score uses machine-learning and data patterns in credit score, debt/liability types, trade lines, rental payment history, and renter behavior to achieve reduced bad debt. The RealPage AI Score range is between 1 and 1000 (the higher the score, the less risky the consumer).

From TransUnion

Risk Model Name	Score	Score Factors
Credit Score (Applicant)	752	Lack of sufficient relevant real estate account information Total of all balances on bankcard or revolving accounts is too high The date that you opened your oldest account is too recent Lack of sufficient relevant installment account information

Description
This credit score is a widely used risk model that uses credit report data to predict the likelihood of default. The credit score range is between 300 and 850 (the higher the score, the less risky the consumer).

Credit Accounts

From TransUnion

Account Name	Opened	Last Active	30-59	60-89	90+	Past Due	Balance
JPMCB CARD (Applicant)	10/2010	6/2024	0	0	0	$0.00	$18,751.00

Monthly Payment	High Credit	Type	Comments
	$81,364.00	REVOLVING	Rate/Status 01: Paid or paying as agreed

Payment History

5/24		3/24		1/24		11/23		9/23		7/23		5/23		3/23		1/23		11/22		9/22		7/22	
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Account Name	Opened	Last Active	30-59	60-89	90+	Past Due	Balance
UBS BANK USA (Applicant)	7/2018	5/2024	0	0	0	$0.00	$4,892.00

Monthly Payment	High Credit	Type	Comments
	$15,289.00	REVOLVING	Rate/Status 01: Paid or paying as agreed

Payment History

4/24		2/24		12/23		10/23		8/23		6/23		4/23		2/23		12/22		10/22		8/22		6/22	
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Account Name	Opened	Last Active	30-59	60-89	90+	Past Due	Balance
CBNA (Applicant)	10/2018	5/2024	0	0	0	$0.00	$400.00

Monthly Payment	High Credit	Type	Comments
	$1,249.00	REVOLVING	Rate/Status 01: Paid or paying as agreed

Payment History

0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4/24		2/24		12/23		10/23		8/23		6/23		4/23		2/23		12/22		10/22		8/22		6/22	

Account Name	Opened	Last Active	30-59	60-89	90+	Past Due	Balance
CB/BONTON (Applicant)	2/2003	6/2016	0	0	0	$0.00	$0.00

Monthly Payment	High Credit	Type	Comments
	$3,003.00	REVOLVING	CANCELED BY CREDIT GRANTOR Rate/Status 01: Paid or paying as agreed

Payment History

0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5/18		3/18		1/18		11/17		9/17		7/17		5/17		3/17		1/17		11/16		9/16		7/16	

Account Name	Opened	Last Active	30-59	60-89	90+	Past Due	Balance
EXXMBLCITI (Applicant)	6/2011	3/2020	0	0	0	$0.00	$0.00

Monthly Payment	High Credit	Type	Comments
	$293.00	REVOLVING	CANCELED BY CREDIT GRANTOR Rate/Status 01: Paid or paying as agreed

Payment History

0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8/22		6/22		4/22		2/22		12/21		10/21		8/21		6/21		4/21		2/21		12/20		10/20	


Pennsylvania
visitPA.com USA
DRIVER'S LICENSE
NOT FOR REAL ID PURPOSES
097
4d DLN: 23 270 926 DUPS: 00
3 DOB: 03/11/1960
4b EXP: 03/12/2026 4a ISS: 01/06/2022
1 BROWNE
2 PHILIP M
8 1215 RED BARN ROAD
LOWER GWYNEDD, PA 19002
15 SEX: M 18 EYES: GRN
16 HGT: 5'-09"
9 CLASS: C
9a END: NONE
12 RESTR: 1
5 DD: 2205701402800
300000077732
DL
ORGAN DONOR

03/11/1960
Rev06/07/2016

21 0250017398522026

CLASS: C-Single/Comb < 26,001
END: None
RESTR: 1-Corrective Lenses

PENNSYLVANIA 1787

FS INVESTMENTS®

May 16, 2024

RE: Verification of Employment for Phil Browne

To Andrew Hurwitz
Douglas Elliman Real Estate

Please accept this letter as confirmation that Phil Browne has been employed at FS Investments since April 20, 2012. Currently, Phil Browne:

- Holds the title of CFO & Head of Finance and Administration

Should you have any questions or concerns, please do not hesitate to contact me via phone at 215-220-4958 or email at Timothy.McCarty@fsinvestments.com.

Sincerely,

Timothy McCarty
Executive Director, Human Resources

Franklin Square Holdings LP
EIN: 26-0196373

Estimated Taxable Income/(Loss)*
For the Year Ended December 31, 2023

Prepared For: Phillip M. & Liane R. Browne
Partner #48

Schedule K-1 Line Number and Description		Amount
Line 1	Ordinary business income (loss)	879,261
Line 4a	Guaranteed payments for services	1,558,358
Line 4c	Total guaranteed payments	1,558,358
Line 5	Interest income	218,722
Line 6a	Ordinary dividends	142,490
Line 6b	Qualified dividends	71
Line 8	Net short-term capital gain (loss)	3,186
Line 9a	Net long-term capital gain (loss)	(18,468)
Line 11A	Other portfolio income (loss)	394
Line 11H	Section 951(a) income inclusions	660
Line 11R	Specially allocated ordinary gain (loss)	160
Line 11ZZ	Other	10
Line 13A	Cash contributions (60%)	11,208
Line 13H	Investment interest expense	179
Line 13J	Section 59(e)(2) expenditures	446
Line 13R	Pensions and IRAs	43,200
Line 13V	Section 743(b) negative adjustments	182,314
Line 13AE	Deductions-portfolio income	3,389
Line 13ZZ	Other	11
Line 14A	Net earnings (loss) from self-employment	1,558,356
Line 18C	Nondeductible expenses	23,361
Taxable Income/(Loss)		**2,544,026**

*Actual amounts reported on your Schedule K-1 may differ materially from the above. Please consult with your tax advisor to determine your tax implications with respect to this information.
*Franklin Square Holdings, L.P. ("Partnership") is a Specified Service Trade or Business as defined under IRC §199A and the Treasury Regulations.
*The Partnership generated income in excess of the limitations provided under IRC §163(j) for interest deductibility. We expect there to be excess taxable income to be included on the schedule K-1 to be provided later.

Franklin Square Holdings LP
EIN: 26-0196373

Estimated State Source Income
For the Year Ended December 31, 2023

Prepared For: Phillip M. & Liane R. Browne
Partner #48

SUMMARY OF STATE SOURCE INCOME, WITHHOLDING, AND COMPOSITE FILING

ESTIMATED STATE TAX INFORMATION (Note D):

State	Included in Composite Filing (Y/N) (Note A)	Taxpayer Classification for Partners Included in Nonresident Withholding (Note B and Note C)	Source Income/(Loss) (Note E)	Estimated Non-Resident Withholding Tax Paid
ARIZONA	Y	N/A - Withholding Not Available	0	N/A
CALIFORNIA	N	Individual, Partnership, Trust, Grantor Trust, Estate (Note F)	197,910	2,480
COLORADO	Y	Individual, Trust, Grantor Trust, Estate	0	0
CONNECTICUT**	N/A	N/A – Withholding Not Available (Note G)	22,965	N/A
GEORGIA	Y	Individual, Partnership, Trust, Grantor Trust, Estate	147	0
IDAHO	Y	Individual, Partnership, Trust, Grantor Trust, Estate	2	N/A
ILLINOIS	N/A	Individual, Partnership, Trust, Grantor Trust, Estate	84	4
INDIANA	Mandatory	N/A - Withholding Not Available	0	N/A
IOWA	Mandatory	N/A - Withholding Not Available	13	1
KANSAS	Y	N/A - Withholding Not Available	6	N/A
LOUISIANA	Mandatory	N/A - Withholding Not Available	263	N/A
MARYLAND	Y	Individual, Partnership, Trust, Grantor Trust	111	0
MASSACHUSETTS	N/A	Individual, Partnership, Trust, Grantor Trust, Estate	1,707	0
MINNESOTA	Y	Individual, Grantor Trust	57	0
MISSOURI	Y	Individual, Grantor Trust	0	0
NEW JERSEY	Y	Individual, Partnership, Trust, Grantor Trust, Estate	61,024	0
NEW YORK	Y	Individual	-13,724	0
NORTH CAROLINA	N/A	Individual, Partnership, Trust, Grantor Trust, Estate	78	4
OHIO	Y	Individual, Partnership, Trust, Grantor Trust, Estate	5,681	0
OKLAHOMA	N/A	N/A - Withholding Not Available (Note H)	46	N/A
OREGON	Y	Individual, Partnership, Trust, Grantor Trust, Estate	245	0
PENNSYLVANIA	N/A	N/A – 100% KOIZ Exempt	Note I	N/A
UTAH	N/A	Individual, Partnership, Trust, Grantor Trust, Estate	100	5
WISCONSIN	Y	Individual, Partnership, Trust, Grantor Trust, Estate	24	0

**Your estimated Connecticut PTE tax credit is: $1,711

FS INVESTMENTS

Employer Name: Franklin Square Holdings, L.P.
Employer Phone: 215-240-7279
Employer Address: 201 Rouse Boulevard
Philadelphia, PA 19112

Employee Name: Philip Browne
Employee #: 000195
Employee Address: 1215 Red Barn Road
Ambler, PA 19002
Department: EC
Job Title: CFO & Head of Finance and Administration

Pay Date: 12/29/2023
Pay Period: 12/16/2023 - 12/31/2023
Deposit Advice #: 708907754
Pay Frequency: Semi-Monthly
Federal Filing Status: Single
Federal Exemptions: 2/$0.00
State Filing Status: Single (PA)
State Exemptions: 2 (PA)

	Current 12/16/2023 - 12/31/2023			YTD As of 12/31/2023	
	Hours/Units	**Rate**	**Amount**	**Hours/Units**	**Amount**
Memo Information			**$63.50**		**$924.00**
GTL			$13.50		$324.00
Partner LTD			$50.00		$600.00
Post-Tax Deductions			**$175.00**		**$109,200.00**
401K Partner Percent					$30,000.00
PAC			$175.00		$4,200.00
Loan Repayment					$75,000.00
Reimbursements			**$20,833.33**		**$1,542,999.92**
Partner Salary			$20,833.33		$499,999.92
Partner Bonus					$338,000.00
Prn Bonus PY					$105,000.00
Partner Bonus					$600,000.00
	Routing #	**Account #**	**Amount**		**Amount**
Net Pay			**$20,658.33**		**$1,433,799.92**
Direct Deposit	044000804	XXXXXX7709	$20,658.33		

UBS Financial Services Inc.
Private Wealth Management
1735 Market Street
44th Floor
Philadelphia PA 19103-7507

ENP7000357793 0424 U6 0

Summary of your UBS Portfolio

April 2024

PHILIP M BROWNE
LIANE R BROWNE TEN COMM
1215 RED BARN RD
LOWER GWYNEDD PA 19002-1277

UBS

UBS

UBS Financial Services Inc.
Private Wealth Management
1735 Market Street
44th Floor
Philadelphia PA 19103-7507

ENP7000357795 0424 U6 0

Summary of your UBS Portfolio

April 2024

PHILIP M BROWNE
LIANE R BROWNE TEN COMM
1215 RED BARN RD
LOWER GWYNEDD PA 19002-1277

Your Financial Advisor:
MICHAEL B. GREENLY
Branch: 215-496-2000/800-345-7941

Visit our website:
www.ubs.com/financialservices

Value of your portfolio

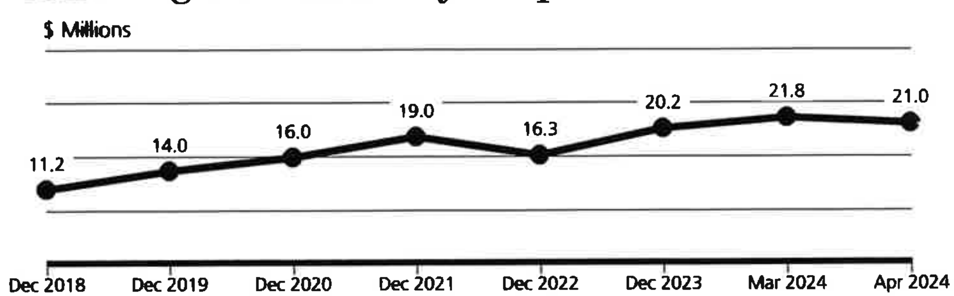
	on March 28 ($)	on April 30 ($)
Your assets	21,821,374.47	20,978,701.55
Your liabilities	0.00	0.00
Value of your portfolio	**$21,821,374.47**	**$20,978,701.55**
Accrued interest in value above	$24,922.02	$25,822.53

As a service to you, your portfolio value of $20,978,701.55 includes accrued interest and the following assets that are not held by UBS:

Insurance products	$136,579.84

Information about these assets not held by UBS, including their value, was provided by an external source for which UBS is not responsible. These assets are not covered by SIPC. See the section *Your assets* for details.

Tracking the value of your portfolio



Sources of your portfolio growth during 2024

Value of your portfolio at year end 2023	$20,227,267.69
Net deposits and withdrawals	-$199,381.15
Your investment return:	
Dividend and interest income	$218,397.88
Change in value outside assets/accruals	$28,927.37
Change in market value	$703,489.76
Value of your portfolio on Apr 30, 2024	**$20,978,701.55**

Your portfolio balance sheet

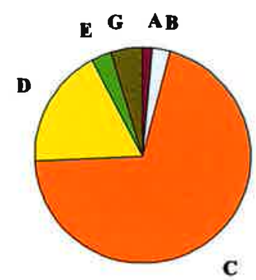
The value of your portfolio includes assets held at UBS and certain assets held away from UBS. See page 1 for more information.

Summary of your assets

		Value on April 30 ($)	Percentage of your portfolio
A	Cash and money balances	327,454.09	1.56%
B	Cash alternatives	553,849.76	2.64%
C	Equities	14,710,355.12	70.12%
D	Fixed income	3,766,374.19	17.95%
E	Non-traditional	620,594.00	2.96%
F	Commodities	0.00	0.00%
G	Other	1,000,074.39	4.77%
Total assets		**$20,978,701.55**	**100.00%**

Value of your portfolio **$20,978,701.55**

Your current asset allocation



Cash and money balances may include available cash balances, UBS Bank USA deposit account, UBS FDIC Insured Deposit Program Bank accounts, UBS Insured Sweep Program Bank accounts, UBS AG Stamford Branch deposit account balances and money market mutual fund sweep balances. See the *Important information about your statement* on the last two pages of this statement for details about those balances.

Eye on the markets

	Percentage change	
Index	April 2024	Year to date
S&P 500	-4.08%	6.04%
Russell 3000	-4.40%	5.18%
MSCI - Europe, Australia & Far East	-2.35%	3.33%
Barclays Capital U.S. Aggregate Bond Index	-2.53%	-3.28%

Interest rates on April 30, 2024

3-month Treasury bills: 5.31%

One-month SOFR: 5.33%

Your Financial Advisor:
MICHAEL B. GREENLY

Accounts in your portfolio

The values of your accounts include assets held at UBS and certain assets held away from UBS. See page 1 and the account statements that follow for more information.

Details on page	Account number	Account name and type	Value on March 28 ($)	Value on April 30 ($)	Percentage of portfolio
**	U6 02804 MG	Jnt Brokerage - RMA	11,678,878.54	10,944,785.63	52.17%
**	U6 02806 MG	Liane Roth IRA - Managed by UBS HV	212,490.07	203,815.62	0.97%
**	U6 02807 MG	Phil Roth Mgd - Managed by ADVISOR ALLOCATION PROGRAM	1,456,334.58	1,401,110.68	6.68%
**	U6 02816 MG	Liane Roll IRA - Managed by ADVISOR ALLOCATION PROGRAM	976,059.26	942,216.31	4.49%
**	U6 02819 MG	Phil RO IRA Mgd - Managed by ADVISOR ALLOCATION PROGRAM	928,450.53	893,192.84	4.26%
**	U6 02909 MG	Jnt PMP - Managed	1,007,064.24	976,345.37	4.65%
**	U6 02911 MG	Jnt Franklin Te - Managed by Franklin Templeton	1,594,665.77	1,570,917.27	7.49%
**	U6 03007 MG	Jnt UBS Muni - Managed by UBS Asset Management	663,675.42	657,107.93	3.13%
**	U6 03257 MG	Browne Ins Tst - RMA	140,808.92	136,579.84	0.65%
**	U6 03984 MG	Phil Roth IRA - Roth IRA	167,772.58	172,106.08	0.82%
**	U6 05565 MG	Jnt QGARP - Managed by UBS ASSET MANAGEMENT	1,103,703.55	1,151,397.77	5.49%
**	U6 05612 MG	Jnt Mid Cap - Managed by UBS ASSET MANAGEMENT	383,566.97	366,688.15	1.75%
**	U6 05611 MG	Jnt Div Ruler - Managed by UBS ASSET MANAGEMENT	956,353.16	909,221.42	4.34%
**	U6 05732 MG	Phil Bene IRA - Managed by HV ETF Foundation	5,607.75	5,407.08	0.03%
**	U6 06443 MG	Jnt KA SMID - Managed by Kayne Anderson Investment	545,943.13	647,809.56	3.08%
*	U6 02809 MG	Liane Single - RMA	0.00	0.00	0.00%

continued next page

Accounts in your portfolio (continued)

Details on page	Account number	Account name and type	Value on March 28 ($)	Value on April 30 ($)	Percentage of portfolio
*	5V Q9031 MG 5F 59914 MG	UBS Bank USA - Credit Line - Loan UBS Bank USA - Fix Credit Line - Loan	0.00	0.00	0.00%
	Total		**$21,821,374.47**	**$20,978,701.55**	**100 %**

* indicates the accounts' prior period value is included in the Tracking the value of your portfolio on the first page.

** indicates the statement for this account has been suppressed from printing.

Change in the value of your accounts

The values of your accounts include assets held at UBS and certain assets held away from UBS. See page 1 and the account statements that follow for more information.

Account	Opening value on April 1 ($)	Deposits, including securities transferred in ($)	Withdrawals and fees, including securities transferred out ($)	Dividend and interest income ($)	Change in value of outside assets and accruals ($)	Change in market value ($)	Closing value on April 30 ($)
U6 02804 MG Jnt Brokerage - RMA	11,678,878.54	284,969.95	-713,696.98	24,380.07	131.11	-329,877.06	10,944,785.63
U6 02806 MG Liane Roth IRA - Roth IRA	212,490.07	0.00	-396.24	252.74	0.00	-8,530.95	203,815.62
U6 02807 MG Phil Roth Mgd - Roth IRA	1,456,334.58	0.00	-3,012.68	3,065.43	0.00	-55,276.65	1,401,110.68
U6 02816 MG Liane Roll IRA - IRA Rollover	976,059.26	0.00	-1,991.24	2,294.51	0.00	-34,146.22	942,216.31
U6 02819 MG Phil RO IRA Mgd - IRA Rollover	928,450.53	0.00	-1,920.61	1,954.04	0.00	-35,291.12	893,192.84
U6 02909 MG Jnt PMP - Managed	1,007,064.24	0.00	-1,877.93	11,646.21	0.00	-40,487.15	976,345.37

continued next page

UBS

Summary of your UBS portfolio
April 2024

Your Financial Advisor:
MICHAEL B. GREENLY

Change in the value of your accounts (continued)

Account	Opening value on April 1 ($)	Deposits, including securities transferred in ($)	Withdrawals and fees, including securities transferred out ($)	Dividend and interest income ($)	Change in value of outside assets and accruals ($)	Change in market value ($)	Closing value on April 30 ($)
U6 02911 MG Jnt Franklin Te - Managed	1,594,665.77	0.00	-1,415.27	7,124.06	-1,326.84	-28,130.45	1,570,917.27
U6 03007 MG Jnt UBS Muni - Managed	663,675.42	0.00	-577.54	592.81	2,096.24	-8,679.00	657,107.93
U6 03257 MG Browne Ins Tst - RMA	140,808.92	0.00	0.00	0.00	-4,229.08	0.00	136,579.84
U6 03984 MG Phil Roth IRA - Roth IRA	167,772.58	0.00	0.00	4,059.75	0.00	273.75	172,106.08
U6 05565 MG Jnt QGARP - Managed	1,103,703.55	100,000.00	-2,494.36	476.46	0.00	-50,287.88	1,151,397.77
U6 05612 MG Jnt Mid Cap - Managed	383,566.97	0.00	-837.00	141.71	0.00	-16,183.53	366,688.15
U6 05611 MG Jnt Div Ruler - Managed	956,353.16	0.00	-2,133.55	1,583.95	0.00	-46,582.14	909,221.42
U6 05732 MG Phil Bene IRA - IRA	5,607.75	0.00	-10.46	0.00	0.00	-190.21	5,407.08
U6 06443 MG Jnt KA SMID - Managed	545,943.13	150,000.00	-1,665.72	383.88	0.00	-46,851.73	647,809.56
Total	**$21,821,374.47**	**$534,969.95**	**-$732,029.58**	**$57,955.62**	**-$3,328.57**	**-$700,240.34**	**$20,978,701.55**

Dividend and interest income earned by account

For purposes of this statement, taxability of interest and dividend income has been determined from a US tax reporting perspective. Based upon the residence of the account holder, account type, or product type, some interest and/or dividend payments may not be subject to United States (US) and/or Puerto Rico (PR) income taxes. The client monthly statement is not intended to be used and cannot be relied upon for tax purposes. Clients should refer to the applicable tax reporting forms they receive from UBS annually, such as the Forms 1099 and the Forms 480, for tax reporting information. It is the practice of UBS to file the applicable tax reporting forms with the US Internal Revenue Service and PR Treasury Department, and in such forms accurately classify dividends and/or interest as tax exempt or taxable income. Please consult your individual tax preparer.

	Year to date						
Taxable accounts	Taxable dividends/ Capital gains ($)	Tax-exempt dividends ($)	Taxable interest ($)	Tax-exempt interest ($)	Miscellaneous ($)	Total ($)	Estimated Annual Income($)
U6 02804 MG Jnt Brokerage - RMA	68,044.85	0.00	8,055.89	0.00	5,660.75	81,761.49	196,879
U6 02909 MG Jnt PMP - Managed	49,319.44	0.00	929.91	0.00	0.00	50,249.35	18,968
U6 02911 MG Jnt Franklin Te - Managed	0.00	0.00	94.44	20,052.77	0.00	20,147.21	69,550
U6 03007 MG Jnt UBS Muni - Managed	0.00	0.00	29.74	7,136.81	0.00	7,166.55	28,711
U6 05565 MG Jnt QGARP - Managed	2,485.19	0.00	19.52	0.00	0.00	2,504.71	7,742
U6 05612 MG Jnt Mid Cap - Managed	1,240.07	0.00	6.44	0.00	0.00	1,246.51	3,653
U6 05611 MG Jnt Div Ruler - Managed	5,614.90	0.00	15.20	0.00	0.00	5,630.10	18,969
U6 06443 MG Jnt KA SMID - Managed	1,027.99	0.00	20.08	0.00	0.00	1,048.07	4,942
Total taxable accounts	**$127,732.44**	**$0.00**	**$9,171.22**	**$27,189.58**	**$5,660.75**	**$169,753.99**	**$349,414**

continued next page

Dividend and interest income earned by account (continued)

Tax-deferred accounts	Year to date: Dividends ($)	Interest ($)	Miscellaneous ($)	Total ($)	Estimated Annual Income($)
U6 02806 MG Liane Roth IRA - Roth IRA	1,101.52	2.01	0.00	1,103.53	5,239
U6 02807 MG Phil Roth Mgd - Roth IRA	11,701.98	22.96	0.00	11,724.94	39,443
U6 02816 MG Liane Roll IRA - IRA Rollover	7,967.21	14.73	0.00	7,981.94	28,982
U6 02819 MG Phil RO IRA Mgd - IRA Rollover	7,470.69	15.15	0.00	7,485.84	25,115
U6 03984 MG Phil Roth IRA - Roth IRA	7,938.75	701.83	0.00	8,640.58	14,016
U6 05732 MG Phil Bene IRA - IRA	9.52	0.00	0.00	9.52	110
Total tax-deferred accounts	**$36,189.67**	**$756.68**	**$0.00**	**$36,946.35**	**$112,905**

Summary of gains and losses by account

Values reported below exclude products for which gains and losses are not classified and products with a trade date of the prior year.

Realized gains and losses / Unrealized gains and losses

	Realized: April 2024		Realized: Year to date		Unrealized gains and losses	
Taxable accounts	Short term ($)	Long term ($)	Short term ($)	Long term ($)	Short term ($)	Long term ($)
U6 02804 MG Jnt Brokerage - RMA	0.00	0.00	0.00	0.00	1,334.17	6,194,941.20
U6 02909 MG Jnt PMP - Managed	0.00	0.00	0.00	0.00	437.23	227,617.58

continued next page

Summary of gains and losses by account (continued)

Taxable accounts (continued)	Realized gains and losses: April 2024 Short term ($)	April 2024 Long term ($)	Year to date Short term ($)	Year to date Long term ($)	Unrealized gains and losses: Short term ($)	Long term ($)
U6 02911 MG Jnt Franklin Te - Managed	0.00	0.00	0.00	-3,159.83	-2,307.11	-15,291.13
U6 03007 MG Jnt UBS Muni - Managed	0.00	0.00	0.00	0.00	-3,037.49	-13,991.05
U6 05565 MG Jnt QGARP - Managed	-149.81	-1,890.29	-728.83	-2,040.64	40,186.41	299,492.49
U6 05612 MG Jnt Mid Cap - Managed	-746.55	477.43	-2,130.18	6,206.49	7,619.05	91,838.05
U6 05611 MG Jnt Div Ruler - Managed	-127.28	-546.77	-1,659.64	1,036.82	21,056.76	198,993.24
U6 06443 MG Jnt KA SMID - Managed	0.00	0.00	595.20	0.00	14,100.31	0.00
Total taxable accounts	**-$1,023.64**	**-$1,959.63**	**-$3,923.45**	**$2,042.84**	**$79,389.33**	**$6,983,600.38**
Tax-deferred accounts						
U6 02806 MG Liane Roth IRA - Roth IRA	0.00	0.00	1,918.20	101.04	23,304.94	-13.39
U6 02807 MG Phil Roth Mgd - Roth IRA	-34.73	1,700.29	4,534.57	23,204.10	23,438.53	64,838.03
U6 02816 MG Liane Roll IRA - IRA Rollover	0.00	827.98	3,926.95	23,089.19	15,708.99	35,040.48
U6 02819 MG Phil RO IRA Mgd - IRA Rollover	0.00	1,028.89	2,752.27	15,160.49	14,631.36	38,842.06
U6 03984 MG Phil Roth IRA - Roth IRA	0.00	0.00	0.00	0.00	0.00	-16,574.70

continued next page

Summary of gains and losses by account (continued)

Realized gains and losses	April 2024		Year to date		Unrealized gains and losses	
Tax-deferred accounts (continued)	Short term ($)	Long term ($)	Short term ($)	Long term ($)	Short term ($)	Long term ($)
U6 05732 MG Phil Bene IRA - IRA	0.00	0.00	0.00	-10.46	25.74	327.33
Total tax-deferred accounts	**-$34.73**	**$3,557.16**	**$13,131.99**	**$61,544.36**	**$77,109.56**	**$122,459.81**

UBS

Your notes

FS INVESTMENTS

Employer Name: Franklin Square Holdings, L.P.
Employer Phone: 215-240-7279
Employer Address: 201 Rouse Boulevard, Philadelphia, PA 19112

Employee Name: Philip Browne
Employee #: 000195
Employee Address: 1215 Red Barn Road, Ambler, PA 19002
Department: Finance
Job Title: CFO & Head of Finance and Administration

Pay Date: 4/30/2024
Pay Period: 4/16/2024 - 4/30/2024
Deposit Advice #: 764394419
Pay Frequency: Semi-Monthly
Federal Filing Status: Single
Federal Exemptions: 2/$0.00
State Filing Status: Single (PA)
State Exemptions: 2 (PA)

	Current 4/16/2024 - 4/30/2024			YTD As of 4/30/2024	
	Hours/Units	**Rate**	**Amount**	**Hours/Units**	**Amount**
Memo Information			**$63.50**		**$308.00**
GTL			$13.50		$108.00
Partner LTD			$50.00		$200.00
Post-Tax Deductions			**$1,216.67**		**$9,733.36**
401K Partner Percent			$1,041.67		$8,333.36
PAC			$175.00		$1,400.00
Reimbursements			**$20,833.33**		**$166,666.64**
Partner Salary			$20,833.33		$166,666.64
	Routing #	**Account #**	**Amount**		**Amount**
Net Pay			**$19,616.66**		**$156,933.28**
Direct Deposit	044000804	XXXXXX7709	$19,616.66		

FS INVESTMENTS

Employer Name: Franklin Square Holdings, L.P.
Employer Phone: 215-240-7279
Employer Address: 201 Rouse Boulevard Philadelphia, PA 19112

Employee Name: Philip Browne
Employee #: 000195
Employee Address: 1215 Red Barn Road Ambler, PA 19002
Department: Finance
Job Title: CFO & Head of Finance and Administration

Pay Date: 4/15/2024
Pay Period: 4/1/2024 - 4/15/2024
Deposit Advice #: 757669208
Pay Frequency: Semi-Monthly
Federal Filing Status: Single
Federal Exemptions: 2/$0.00
State Filing Status: Single (PA)
State Exemptions: 2 (PA)

	Current 4/1/2024 - 4/15/2024			YTD As of 4/15/2024	
	Hours/Units	Rate	Amount	Hours/Units	Amount
Memo Information			**$13.50**		**$244.50**
GTL			$13.50		$94.50
Partner LTD					$150.00
Post-Tax Deductions			**$1,216.67**		**$8,516.69**
401K Partner Percent			$1,041.67		$7,291.69
PAC			$175.00		$1,225.00
Reimbursements			**$20,833.33**		**$145,833.31**
Partner Salary			$20,833.33		$145,833.31
	Routing #	**Account #**	**Amount**		**Amount**
Net Pay			**$19,616.66**		**$137,316.62**
Direct Deposit	044000804	XXXXXX7709	$19,616.66		

Prepared For: Phillip M. & Liane R. Browne
Partner #48

Notes:

A. Inclusion in state composite returns are based on your responses to the composite election letters, modified where necessary to reflect eligibility requirements.

B. Franklin Square Holdings LP will remit nonresident withholding on your behalf if your taxpayer classification is listed in the column, you are a nonresident, and you have NOT elected to be included in a composite return. If your interest in the Partnership is held through a disregarded entity the ultimate taxpayer's classification should be used to determine if withholding will be remitted. Please refer back to your composite election letter when determining if withholding will be made on your behalf.

C. Franklin Square Holdings LP made nonresident withholding payments in 2023 based on the requirements referenced in Note B, assuming that all partners who elected to participate in a composite return in 2022 would be making similar elections in 2023. Therefore, if you elected to be included in a 2022 composite return, but did not elect composite in 2023, no 2023 withholding payments have been made on your behalf in these states.

D. The estimated amounts are based on your partnership interest in the Partnership (which may vary due to share repurchase, share issuances, or other transactions before the information is finalized). This information should be shared with your tax advisor for purposes of estimating your tax position. Further, this information does not take into account whether you may elect to participate in composite returns (if eligible) in these states.

E. Source income has been calculated based on state specific rules to allocate or apportion items of income or loss.

F. California Form 592-B is attached to this letter if you were subject to nonresident withholding in the state.

G. In 2018, Connecticut enacted Public Act No. 18-49 which established a new tax on pass-through entities ("PTE tax") at a rate of 6.99%. The PTE tax will apply to all tax years subsequent to December 31, 2017 and will replace the composite income tax. Although the PTE tax is paid at the entity level, each individual partner will be allowed a Connecticut credit equal to his or her direct and indirect pro rata share of the tax paid multiplied by 87.5%.

H. The Partnership elected to be subject to Oklahoma's Pass-Through Entity tax. No composite return or withholding is required.

I. The Partnership is certified as a "qualified business" under Section 307 of the Keystone Opportunity Improvement Zone Act and, thus, is eligible to receive an exemption of income for income sourced to a Keystone Opportunity Improvement Zone ("KOIZ"). In 2023, the Partnership operated at a Pennsylvania loss due to the tiered partnership structure and application of the KOIZ exemption at each separate legal entity level.

Pennsylvania	**RK-1**	**NRK-1**
Business Income/(Loss)	(927,443)	(1,062,730)
Guaranteed Payments	735,515	822,843

Pennsylvania
visitPA.com USA

DRIVER'S LICENSE
NOT FOR REAL ID
PURPOSES

UNDER 21 UNTIL 09/22/2022

DUPS 00
4d DLN 32 941 166
3 DOB: 09/22/2001
4b EXP: 09/23/2025
4a ISS: 07/28/2021
15 SEX: M 18 EYES: GRN
16 HGT: 5'-06"

1 BROWNE
2 ALEXANDER CALEB
8 1215 RED BARN RD
AMBLER, PA 19002

9 CLASS: C
9a END: NONE
12 RESTR: NONE

DL

5 DD: 2123601303801
100000013780

09/22/2001
Rev08/07/2016

21 0250039123021161

CLASS: C-Single/Comb < 26,001
END: None
RESTR: None

Notify PennDOT if you move within 15 days. Visit us at www.dmv.pa.gov
or call us at 717-412-5300. TTY callers - Please dial 711 to reach us.

11-Aug-2023

 Alexander Browne
3720 Chestnut Street
PHILADELPHIA,
PHILADELPHIA
PA
19104
UNITED STATES

Dear Alexander,

Congratulations, we are pleased to formally present the details of your employment offer from JPMorgan Chase*.

You will join us as a Full-time Analyst in our Global Private Bank Advisor Program at JPMorgan Chase & Co., and will carry out your role while physically present in the JPMorgan Chase & Co. offices in New York.

We expect you to start in or around Jul-2024, and will communicate the specific date at a later time.

Your Pay:
Your annual base salary will be $100,000.00 (less applicable taxes), and will cover all the hours you work, which may vary based on business needs. We will pay you consistent with JPMorgan Chase & Co. practices, and your position is not eligible for overtime.

Training:
This training is essential to your success; you must attend and be on time.

During the initial Training Program, we expect your regular pay rate to be $22.62 per hour and for your position to be eligible for overtime. We expect you to work 70 hours per week generally, and to pay you during the initial Training Program for 40 hours at regular pay and 30 hours at an overtime pay rate of $33.93 per hour. That equates to an annualized base salary of $100,000.00 (less applicable deductions) payable consistent with JPMorgan Chase policies. Once you begin working, we'll teach you how to report your hours.

Special Payment:
You will receive a $10,000.00 one-time special payment subject to the terms and conditions of your offer.

This payment is subject to appropriate taxes, which will be deducted from payments before or after your employment begins. If your employment terminates within 12 months of your start date for any reason other than job elimination or you withdraw your acceptance of employment before you start with JPMorgan Chase & Co., you agree to immediately repay JPMorgan Chase & Co. the full amount of the one-time special payment. If you fail to repay it immediately, you will be responsible for JPMorgan Chase & Co. attorneys' fees and costs of collection. Further, you agree that JPMorgan Chase & Co. may withhold, to the fullest extent permitted by law, any other payment not yet made to you at the time you leave JPMorgan Chase & Co. to satisfy your reimbursement obligation partially or totally.

Incentive Compensation:
You will be eligible for annual incentive awards under the JPMorgan Chase Performance-Based Incentive Compensation Plan. We award incentives based on a number of factors, including your individual achievement, the results of your business unit and the overall performance of JPMorgan Chase. JPMorgan Chase & Co. has complete discretion over these awards, which will be subject to applicable taxes and the JPMorgan Chase Bonus Recoupment Policy.

If you receive an award, you will be paid either in cash or in a combination of cash and forfeitable equity, in line with our incentive plan practices. Any equity portion will be subject to the terms and conditions of the Award Agreement, which will include recovery provisions, non-solicitation and similar covenants.

If your employment ends or you give us notice of your resignation before the payment date for Incentive Plan awards, you won't be eligible for any payments.

During your employment any commitment as to an amount or timing of an incentive award must be in writing signed by a Managing Director or equivalent of the firm and a human resources officer at the level of Vice-President or above.

Business Aligned Securities Licensing:
When you start, you must obtain, retain and/or successfully transfer the Securities Industry Essential (SIE) or equivalent top off series, Series 7, Series 66 registrations and/or insurance licenses required by FINRA and the state. If you are obtaining your registrations and/or licenses, we will give you appropriate reading materials and study time to help you do this. If you don't obtain the licenses, including earning acceptable scores and ultimately passing the required exams by 120 days, we may terminate your employment.

Licensing and Registration Repayment:
If you are obtaining your registrations and/or licenses we may require you to sign a Repayment Agreement as a condition of your employment. It requires you to repay us for the licensing and registration expenses if you resign within one year after getting your registrations, insurance licenses, and/or certifications.

Pre-employment Processing:
Our offer of employment is subject to you being able to carry out your role while being able to be physically present in a JPMC office in New York and the successful completion of your degree (for full-time associates and analysts) before your start date. This offer of employment is also subject to the satisfactory completion of all pre-employment processing, including various background checks, fingerprint processing, drug screening (if applicable), and Government employment screening (if applicable), as well as execution of any other forms necessary for employment. This offer and continued employment is contingent upon your ability to establish identity and valid employment eligibility by completing a Form I-9 on the new hire portal. We will verify your employment eligibility through the E-Verify Program, which allows employers to electronically compare information taken from the Form I-9 against records of the Social Security Administration and the Department of Homeland Security. Please be prepared to present your identity and employment eligibility documents before your first day so we can resolve any issues before your new opportunity begins.

You will be updated throughout the process on the steps that need to be completed before starting your position. If you have questions, please contact the JPMorgan Chase Pre-Employment team at 1-877-576-2427.

Benefits:
JPMorgan Chase provides a comprehensive benefits program for our employees and their eligible dependents. Please visit the new hire portal during your onboarding process for details about the various plans and how to enroll in them.

JPMorgan Chase provides employees certain benefit materials electronically via company email and/or Intranet (accessible from work and home). By accepting this offer, you consent to receiving documents electronically, including summary plan descriptions and plan prospectuses, for the JPMorgan Chase Benefits Program. If you prefer a paper copy, you can request it from the applicable call center for that benefit plan. A list of plan call centers can be found under the Benefits at a Glance session in the Highlights of the JPMorgan Chase U.S. Benefits Program.

Vacation:
Under JPMorgan Chase current policy, you will be eligible for 3 Weeks of vacation per year, with your start date determining how much you receive for the year.

Introductory Period and "At-Will" Employment:
Your first 90 days on the job are an introductory period, allowing us to evaluate how you're adjusting to your new job and our organization. We also use it to make sure that you understand your role and responsibilities and our performance standards and policies. As an "at-will" employee at the firm, either you or JPMorgan Chase & Co. can end your employment at any time, for any or no reason.

Terms & Conditions:
Review all the information in this letter to confirm that it reflects our discussions. This document will legally supersede anything we've communicated previously verbally or in writing. If anything needs to change, we must create a new document that refers to this offer and both you and JPMorgan Chase & Co. will need to sign it.

This offer of employment is subject to all the terms, conditions and attachments included in this document, the Binding Arbitration Agreement and all Firm policies and procedures, including but not limited to the JPMorgan Chase Code of Conduct.

I wish you great success as you venture down this new path. If you have questions about any aspect of this offer, please contact me at 13102012765 or talyse.hampton@jpmorgan.com.

Sincerely,
Talyse Hampton
Campus Recruiting

*Your formal legal employer is JPMorgan Chase Bank, National Association or such other legal entity as we may later designate.

Appendix: Systems Monitoring Activities and Cross-Border Transfers:

The following provides a summary of how JPMorgan Chase & Co., its affiliates and its subsidiaries and the entity that employs you, or for which you provide services (collectively, "JPMC"), conducts Systems monitoring. JPMC may conduct monitoring to the extent permitted by applicable law.

JPMC conducts monitoring of JPMC's physical facilities and its equipment and systems (collectively, the "Systems"). System monitoring applies to your JPMC equipment, your personal equipment when accessing the Systems, and the communications, information, and materials conveyed or accessed using the Systems. Monitoring activities may include the monitoring and logging of traffic and usage data of all electronic communications; monitoring of telephone calls to or from JPMC work telephones as permitted by applicable laws and subject to any required notices; monitoring of the contents of electronic communications, files, databases, applications, and internet usage; and logging hours worked and physical presence at JPMC's facilities if applicable. JPMC may at all times monitor, access, retrieve, record and review information obtained from the monitoring activities for various purposes, such as preventing and investigating activities that may violate JPMC's policies and ensuring compliance with legal or regulatory obligations. While conducting monitoring activities, JPMC may obtain and process personal information about you and others that may reside on the Systems.

The monitoring activities (including JPMC's collection and processing of personal or other information) are required for purposes of your employment or work assignment to promote adherence to applicable policies and regulations. Subject to applicable laws and regulations, if you object to this processing, JPMC may prohibit you from using the Systems; terminate offers of employment or work assignment; and, for employees, take disciplinary action against you, up to and including termination of your employment with JPMC.

JPMC may disclose the information it obtains in connection with monitoring activities to JPMC affiliates and to third parties, service providers, regulators, supervisory bodies, law enforcement and other government agencies. Information obtained from the monitoring activities may be used as the basis to take disciplinary actions, up to and including termination or other legal action, for violations of JPMC's policies or applicable laws.

In addition to the monitoring activities discussed above, JPMC may obtain and store other information related to your employment or other working relationship, such as your compensation information, performance information, benefits information and other workplace-related data. JPMC may transfer such information, and the information it obtains in connection with monitoring activities, to countries other than the country in which the information originally was collected, including to the United States.

Understanding Obligations under the Firm's Personal Account Dealing Policy (PAD):

The Personal Account Dealing Policy (Policy) of JPMorgan Chase & Co. (firm or JPMC) is designed to help prevent and detect violations of securities laws and industry conduct standards and to minimize actual or perceived conflicts of interest that could arise due to personal investing activities.

PAD Compliance will notify you if the position you are being offered is considered to be subject to the Policy. You will remain subject for the duration of your time working in a subject group, unless notified otherwise of a change in subject status. Unless otherwise notified, you will continue to be subject to the provisions of the Policy even during leaves of absence from the firm, including, but not limited to, garden leave or medical leave.

You as well as your Connected Persons are subject to the provisions of this Policy and will need to be familiar with the obligations set forth in this policy. Connected Persons includes your spouse, domestic partner or minor children (even if financially independent) as well as anyone to whom you provide significant financial support or for which you, or anyone listed above, has or shares the power, directly or indirectly, to make investment decisions.

Once subject to the Policy, you must disclose and certify your Covered Accounts (which include accounts of your Connected Persons). You will be required to maintain your self-directed Covered Accounts with one of the firm's Approved Brokers and preclear all purchases, sales, pledges and gifts (received and given) of publicly traded and privately held financial instruments, unless listed as specifically exempt. Pre-approval confirmations must be received prior to executing the trade or investment. The firm may impose periodic restrictions on personal trading in certain financial securities. These restrictions can apply to all firm subject Workforce Members and their Connected Persons or may be limited to certain groups. Subject Workforce Members and their Connected Persons are not permitted to recommend or transact in the financial instruments of an issuer while in the possession of material non-public information (MNPI) regarding that issuer.

If you are a seasonal or short term employee the following requirements will apply:

JPMorgan Chase requires that seasonal workers refrain from trading in Covered Accounts for the time period that you are employed in a short term training program. Please verify that you will comply with the following personal trading requirements:

1. For the duration of the short term program I am joining I will not trade in any of my Covered Accounts
2. I understand that the Firm has the right to request account information for any of my Covered Accounts
3. If there is an extenuating circumstance that would compel me to place a trade in my personal or "connected" account, I will obtain pre-approval of the trade by the Personal Account Dealing Group and I would be responsible for supplying all confirmations and statements to the Personal Account Dealing Group for that trade.

*The term Covered Accounts refers to any securities accounts no matter where they are located and includes, but is not limited to, those accounts that are established, maintained or controlled (either directly or indirectly) by you, your spouse, domestic partner or minor children (even if financially independent), anyone to whom you provide significant financial support, and in which the employee has a direct or indirect financial interest.

Global Personal Trading Policy:

The Personal Account Dealing of JPMorgan Chase & Co. is designed to help prevent and detect violations of securities laws and industry conduct standards and to minimize actual or perceived conflicts of interest that could arise due to personal investing activities. This Policy includes requirements for disclosing Covered Accounts, maintaining certain accounts at one of the firm's Approved Brokers, preclearing trades, and restrictions and prohibitions on certain types of trading activity. This Policy is subject to any applicable local laws and rules and should be read in conjunction with Supplements (regional/LOB) as well as the firm's Code of Conduct.

Intellectual Property Requirements:

I will promptly make full written disclosure to JPMC and hereby assign to JPMC, or its designee, all my right, title, and interest in and to any and all inventions, discoveries, creations, developments, concepts, ideas, processes, trademarks, trade secrets, logos, domain names, works, written or otherwise, or any other type of intellectual property, whether or not patentable or registrable under copyright or similar laws or able to be maintained as a trade secret, which I may solely or jointly conceive or develop or reduce to practice, or cause to be conceived or developed or reduced to practice, during the period of time I am in the employ of JPMC, which are directly or indirectly related to the business of JPMC (collectively "Inventions"). I further acknowledge that all original works of authorship which are made by me (solely or jointly with others) within the scope of and during the period of my employment with JPMC and which are protectable by copyright are "works made for hire," as that term is defined in the United States Copyright Act. I understand and agree that the decision whether or not to commercialize or market any Invention developed by me solely or jointly with others is within JPMC's sole discretion and for JPMC's sole benefit and that no royalty will be due to me as a result of JPMC's efforts to commercialize or market any such Invention. I further agree to disclose in writing within 30 days of my start date any and all Inventions which were made by me prior to my employment with JPMC (collectively "Prior Inventions"), which belong to me in whole or in part, and which are not assigned to the JPMC hereunder; or, if no such disclosure is made within the requisite time period, I represent that there are no such Prior Inventions. If in the course of my employment with JPMC, I incorporate into a JPMC product, process, method, or machine a Prior Invention owned by me or in which I have an interest, JPMC is hereby granted and shall have a nonexclusive, royalty-free, irrevocable, perpetual, worldwide license to make, have made, modify, use, and sell such Prior Invention. I agree to assist JPMC, or its designee, in every proper way to secure JPMC's rights in the Inventions and any copyrights, patents, mask work rights, or other intellectual property rights relating thereto in any and all countries, including the disclosure to JPMC of all pertinent information and data with respect thereto, the execution of all applications, specifications, oaths, assignments and all other instruments which JPMC shall deem necessary in order to apply for and obtain such rights and in order to assign and convey to JPMC the sole and exclusive rights, title, and interest in and to such Inventions, and any copyrights, patents, mask work rights, or other intellectual property rights relating thereto. I further agree that my obligation to execute or cause to be executed, when it is in my power to do so, any such instrument or papers shall continue after the termination of my employment with JPMC for any reason. If JPMC is unable because of my mental or physical incapacity or for any other reason to secure my signature to apply for or to pursue any application for any United States or foreign patents or copyright registrations covering Inventions or original works of authorship assigned to JPMC as above, then I hereby irrevocably designate and appoint JPMC and its duly authorized officers and agents as my agent and attorney-in-fact, to act for and in my behalf and stead to execute and file any such applications and to do all other lawfully permitted acts to further the prosecution and issuance of letters patent or copyright registrations thereon with the same legal force and effect as if executed by me.

Acceptance and Code Affirmation:

Upon signing this letter I accept the terms and conditions described above.

I hereby affirm that I have read, understand, and am in compliance with the JPMorgan Chase ("JPMC") Code of Conduct and all internal JPMC policies that apply to me. I agree, as a condition of my employment, to remain in compliance with the Code of Conduct and all applicable JPMC policies.

I understand that I must conduct myself in a way that is consistent with the Code of Conduct, demonstrating compliance with the principles and intent of the Code of Conduct, and applicable laws and regulations.

I also affirm that I have reported any potential or actual violations of the Code of Conduct, JPMC policies, or laws or regulations applicable to JPMC's business, as required by the Code of Conduct. I understand that failure to do so can result in disciplinary action, up to and including termination of employment.

I understand that the Code of Conduct may be updated periodically, as necessary; and that the current version is posted on the JPMorgan Chase intranet as well as on its public website.

Independent Auditor Tax Services to Employees of JPMorgan Chase and its Affiliates:

To be in compliance with the Public Company Accounting Oversight Board (PCAOB) Rule 3523, it is JPMorgan Chase's (JPMC) policy that PricewaterhouseCoopers (PwC) cannot provide any tax services to employees of JPMC or any of its controlled entities (hereafter referred to as JPMC employee). This restriction is regardless of whether the individual is in a financial reporting oversight role or not, and whether PwC is engaged by the individual or by JPMC. PwC is also prohibited from providing any tax services to a spouse of a JPMC employee if the work is related to a joint tax return. Exceptions to this policy will be reviewed on a case-by-case basis and will require the approval of the JPMC Controller.

Binding Arbitration Agreement:

JPMorgan Chase believes that if a dispute related to an employee's or former employee's employment arises, it is in the best interests of both the individual and JPMorgan Chase to resolve the dispute without litigation. Most such disputes are resolved internally through the Firm's Performance, Discipline and Workplace Concerns Policy. When such disputes are not resolved internally, JPMorgan Chase provides for their resolution by binding arbitration as described in this Binding Arbitration Agreement ("Agreement"). "JPMorgan Chase" and the "Firm" as used in this Agreement mean JPMorgan Chase & Co. and all of its direct and indirect subsidiaries.

This Agreement will be governed by the Federal Arbitration Act ("FAA"), 9 U.S.C. section 1 et seq.

As a condition of and in consideration of my employment with JPMorgan Chase, I agree with JPMorgan Chase as follows:

1. SCOPE: Any and all "Covered Claims" (as defined below) between me and JPMorgan Chase or its officers, directors, shareholders, employees, agents, or employee benefit plans sponsored by the Firm (collectively "Covered Parties" or "Parties", individually each a "Covered Party" or "Party") shall be submitted to and resolved by final and binding arbitration in accordance with this Agreement.

2. COVERED CLAIMS: "Covered Claims" include all legally protected employment-related claims and defenses to those claims, excluding those set forth below in Paragraphs 3 and 4 of this Agreement, that I now have or in the future may have which arise out of or relate to my employment or separation from employment with JPMorgan Chase and all legally protected employment-related claims that JPMorgan Chase has or in the future may have against me and defenses to those claims, including, but not limited to, claims of employment discrimination or harassment if protected by applicable federal, state or local law, and retaliation for raising discrimination or harassment claims, failure to pay wages, bonuses or other compensation, tortious acts, wrongful, retaliatory and/or constructive discharge, breach of an express or implied contract, promissory estoppel, unjust enrichment, and violations of any other common law, federal, state, or local statute, ordinance, regulation or public policy, including, but not limited to Title VII of the Civil Rights Act of 1964, the Civil Rights Acts of 1866 and 1991, the Age Discrimination in Employment Act of 1967, the Older Workers Benefit Protection Act of 1990, the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990, the

Family and Medical Leave Act of 1993, the Fair Labor Standards Act of 1938, the Equal Pay Act of 1963, Section 1981 of the Civil Rights Act, and the Worker Adjustment and Retraining Notification Act.

3. EXCLUDED CLAIMS: This Agreement does not cover, and the following claims are not subject to arbitration under this Agreement:
(a) any criminal complaint or proceeding;
(b) any claims covered by state unemployment insurance, state or federal disability insurance, and/or state workers' compensation benefit laws, except that claims for retaliation pursuant to these laws shall be subject to arbitration under this Agreement;
(c) any claim under the National Labor Relations Act;
(d) claims for benefits under a plan that is governed by Employee Retirement Income Security Act of 1974 ("ERISA"); and
(e) any other claims precluded under federal law from being subject to mandatory arbitration.

Further, this Agreement also does not cover any action seeking only emergency, temporary or preliminary injunctive relief (including a temporary restraining order) in a court of competent jurisdiction in accordance with applicable law, so long as that action is brought on an individual basis and not on a consolidated basis or as part of a collective or class action, and subject to the following:

- In the event such relief is sought by a Covered Party, who is not otherwise subject to the arbitration requirements of the Financial Industry Regulatory Authority ("FINRA"), after the court issues a ruling concerning emergency, temporary or preliminary injunctive relief, the parties must submit such claim if otherwise considered a Covered Claim to arbitration pursuant to this Agreement, and

- In connection with any such action related to post-employment restrictions (e.g., actions to enforce rights to trade secrets, or agreements not to compete or solicit customers or employees) on a Covered Party who is otherwise subject to the arbitration requirements of FINRA (absent this Agreement), in order for the Covered Parties to have available to them the expedited arbitration procedures provided by FINRA, after the court issues a ruling concerning emergency, temporary or preliminary injunctive relief, the parties must submit such claim if otherwise considered a Covered Claim to arbitration before FINRA in accordance with its expedited arbitration procedures under FINRA Rule 13804.

4. CLASS ACTION/COLLECTIVE ACTION WAIVER: All Covered Claims under this Agreement must be submitted on an individual basis. No claims may be arbitrated on a class or collective basis unless required by applicable law. Covered Parties expressly waive any right with respect to any Covered Claims to submit, initiate, or participate in a representative capacity or as a plaintiff, claimant or member in a class action, collective action, or other representative or joint action, regardless of whether the action is filed in arbitration or in court. Furthermore, if a court orders that a class, collective, or other representative or joint action should proceed, in no event will such action proceed in the arbitration forum, subject to applicable law. Claims may not be joined or consolidated in arbitration with disputes brought by other individual(s), unless agreed to in writing by all parties or required by applicable law. To the extent there is a question of enforceability of class or collective arbitration, it shall be decided only by a court, not an arbitrator.

The arbitrator's authority to resolve disputes and make awards under this Agreement is limited to disputes between: (i) an individual and JPMorgan Chase; and (ii) the individual and any current or former officers, directors, employees and agents, if such individual is sued for conduct within the scope of their employment. No arbitration award or decision will have any preclusive effect as to issues or claims in any dispute with anyone who is not a named party to the arbitration.

I retain the right to challenge the validity of this Agreement upon grounds that may exist at law or equity and will not be subject to any form of retaliation for asserting such rights.

5. ADMINISTRATIVE AGENCIES: I understand that this Agreement does not preclude me from filing an administrative claim or charge with the Equal Employment Opportunity Commission ("EEOC") and/or state and local human rights agencies to investigate alleged violations of laws enforced by the EEOC or those agencies. However, I understand that I am not required to initiate an administrative agency proceeding before pursuing a Covered Claim under this Agreement. In the event I file such an administrative proceeding, I understand that I cannot pursue Covered Claims under this Agreement without first exhausting all required administrative remedies, such as obtaining a right to sue notice from the EEOC in order to arbitrate federal discrimination claims that require such a notice. By responding to administrative agencies, JPMorgan Chase does not waive its right to enforce this Agreement and the arbitrator shall treat a decision of an administrative agency in the same manner as it would be treated by a court of law.

6. INITIATING ARBITRATION: Arbitration under this Agreement shall be conducted before a single neutral arbitrator of the American Arbitration Association ("AAA")(unless the Parties agree upon another mutually acceptable arbitrator, in which case the arbitration will be conducted before such mutually acceptable arbitrator) in accordance with and selected pursuant to the rules and procedures of the Employment Arbitration Rules of the AAA ("AAA Rules") to the extent the AAA Rules do not conflict with the terms of this Agreement or applicable law. The AAA Rules will govern issues not explicitly addressed by this Agreement. Where there is a conflict between this Agreement and the AAA Rules, this Agreement will govern. Where there is a conflict between applicable law and the AAA rules and/or this Agreement, the applicable law will govern. I understand that arbitration under this Agreement will occur in the state where I am currently or was most recently employed by the Firm, unless otherwise agreed by the Parties. Information about AAA is available from its website www.adr.org. A Covered Party may contact them directly at 1-800-778-7879. A Covered Party who is otherwise subject to the arbitration requirements of FINRA who wishes to pursue arbitration of a Covered Claim, must file such Covered Claim with AAA (or other mutually acceptable arbitrator), except as otherwise provided in Paragraph 3 of this Agreement.

To initiate arbitration:

- A Covered Party must send a written demand for arbitration to any office of the AAA (or if another mutually acceptable arbitrator has been agreed to by the Parties, to the offices of such other arbitrator). The Covered Party submitting the demand for arbitration must also simultaneously send a copy of the written demand for arbitration to the other Party (if being sent to JPMorgan Chase, the copy should be sent to CT Corporation (also known as Corporation Trust Company), the Firm's Registered Agent in each state).

- Both of the following must be included in the demand for arbitration:

(a) A statement of the nature of the dispute, including the alleged act or omission at issue, the names of the parties involved in the dispute, the amount in controversy, if any, the remedy sought to resolve the issue (including the dollar amount, if any), the mailing address for future correspondence and the legal counsel, if any, and

(b) Any required filing fee. If a Covered Claim is filed by me, the filing fee is $100 payable by check, money order or any other method of payment permitted by the AAA (or another mutually acceptable arbitrator agreed to by the parties). In the event the filing fee required by the state or federal court in which the Covered Claim could have been brought is less than $100, JPMorgan Chase agrees to refund to me the difference between $100 and such state or federal court filing fee within 30 days of receiving notice of payment. Any demand received by the AAA (or another mutually acceptable arbitrator agreed to by the Parties) that is not accompanied by the required filing fee will be returned.

Nothing in this Agreement releases a Covered Party from any obligation to comply with timely filing requirements and statutes of limitations under applicable law, statutes, or regulations. Thus, whether or not a Covered Party chooses to mediate a Covered Claim before initiating an arbitration or file with administrative agencies, his/her arbitration must still be initiated as an arbitration within the applicable administrative, statutory or judicial filing time frame, as required by law, and the demand for arbitration must be received at the address above within the time period allowed pursuant to the statute, regulation or other law applicable to the alleged act or omission giving rise to the dispute. Nothing in this Agreement is intended or should be construed to shorten or extend the statute(s) of limitations and/or filing periods that exist under applicable law.

The submission and timing of any response to an arbitration demand shall be in accordance with AAA's Rules, which currently provides that a response be filed within 15 days after the date of the letter from the AAA (or other mutually agreed to arbitrator) acknowledging receipt of the demand for arbitration.

7. ARBITRATION PROCEEDINGS: The arbitrator will conduct the hearing as expeditiously as possible, while ensuring that all Parties have the opportunity to present evidence and arguments and ensuring that the Agreement is followed. The arbitrator will set the date, time, and place of the hearing, and AAA (or other arbitration provider mutually agreed to by the parties) will notify the Parties at least 30 calendar days in advance, unless the Parties otherwise agree. In the event the hearing cannot reasonably be completed in one day, the arbitrator will schedule the hearing to be continued on a date or dates that is/are convenient to both Parties. The arbitrator will make every effort to select a reasonably convenient location for the continued arbitration, without incurring additional expense, if possible.

(a) Fees: All ordinary and reasonable administrative expenses of the arbitration, including fees for a single arbitrator, hearing room expenses, travel expenses of the arbitrator, the AAA representatives (if applicable), and any witnesses produced at the arbitrator's specific request and not otherwise called by a party, will be paid completely by JPMorgan Chase. The fees and expenses of any witness, expert, consultant, interpreter and others retained or consulted by a party shall be paid by the party requiring the presence of such persons, subject to applicable law. JPMorgan Chase will not pay for fees or costs incurred as a result of deliberate and inappropriate delay or absence caused by employees or their counsel, as determined by the arbitrator and permitted by applicable law. Except as otherwise provided by law, all attorney's fees shall be paid by the party that incurs them. Nothing in this Agreement is intended or should be construed to require employees to bear any type of expense that they would not otherwise bear if the Parties were to litigate a Covered Claim in a court of law.

(b) Legal Representation and Language Interpreter: The Parties (if desired) may use the services of legal counsel and/or a language interpreter. The Parties utilizing such services are responsible for making and paying all fee and other arrangements directly with the legal counsel and/or interpreter, subject to applicable law. Nothing in this Agreement is intended or should be construed to require employees to bear any type of expense that they would not otherwise bear if the Parties were to litigate a Covered Claim in a court of law.

(c) Attendance at and Confidentiality of Arbitration Hearing: The Covered Party, a JPMorgan Chase corporate representative of its choosing, and the arbitrator must be present at the hearing. In addition, an official recorder and legal counsel (for any party) also may attend the hearing. Further, the Parties may call witnesses to testify at the arbitration. Unless the parties agree otherwise, the arbitrator shall exclude witnesses (other than the represented Parties) from the hearing during the testimony of any other witness. The arbitrator, the Parties and their representatives must maintain the confidentiality of the hearings unless the law provides otherwise.

(d) Discovery: Discovery requests and the provision of discovery must be consistent with this Agreement, general standards of due process, the Rules of AAA and the expedited nature of arbitration. The guidelines below are only guidelines, do not establish a minimum or maximum of discovery, and will be applied subject to these principles. Thus, there may be cases which warrant more or less discovery than that outlined below.

- At least 20 days before the arbitration hearing, the Parties must submit the names and addresses of the witnesses each party intends to produce and any documents each party intends to present. The Parties may add to such information up to 10 days before the hearing. All such submissions are final after that point absent a finding of good cause by the arbitrator.

- In general, the Parties may take the depositions of all expert witnesses and up to 3 other individuals. Any individual who certifies he/she has no direct knowledge of the facts should not be deposed as a fact witness. At least 10 days' prior notice should be given by the party requesting a deposition and advance efforts should be made to mutually agree on deposition dates, including the time and place for any depositions to be taken. The party requesting the deposition is responsible for all related costs for that deposition. Discovery must be completed at least 20 days before the hearing. The arbitrator may alter the timing and scope of discovery as necessary or upon request of the Parties.

- The arbitrator will resolve discovery disputes and may expand or restrict the scope of discovery within his or her reasonable discretion, and the rules of AAA consistent with the expedited nature of arbitration.

(e) Prehearing Motions: The arbitrator is authorized to consider and rule on prehearing motions, including discovery motions, motions to dismiss and summary judgment on the claims, provided that the other party has reasonable notice and time to respond to any such prehearing motions. Any dispute which fails to state a claim upon which relief may be granted under applicable law (including, but not limited to claims that are barred by the applicable statute of limitations or mandated timeframe for filing such claim, or that are barred by an enforceable release, or involve a claim against someone who was not associated with the conduct at issue) is subject to dismissal without an evidentiary hearing. Any ruling regarding such motion shall be made consistent with the Form of Decision and Scope of Relief sections in this Agreement.

(f) Time of Decision: The arbitrator will make the decision within 30 days of the close of the hearing or as soon as possible thereafter, unless otherwise agreed to by the Parties or otherwise specified by law.

(g) Form of Decision: The decision will be in writing and signed by the arbitrator. Unless otherwise agreed to by the Parties, the decision will include a summary of claims arbitrated and decided, a reasoned opinion setting forth any findings of fact or conclusions of law, and damages and other relief (if any) granted. All decisions shall be executed in the manner required by law. The decision will be final and binding upon the Parties, and appeal of the decision to a court shall be limited as provided by the FAA. Within seven (7) calendar days after the date of issuance of the decision, I may request the arbitrator permit disclosure of the type of damages and amount awarded.

(h) Scope of Relief: The arbitrator may grant any remedy or relief that would have been available to the parties had the matter been heard in court, including the award of monetary damages and the imposition of requirements on the Parties (including injunctive relief), as permitted by applicable law. The arbitrator may award only such relief as may be granted for a Covered Claim brought in court on an individual basis under applicable law. The arbitrator may award punitive or exemplary damages or attorneys' fees as provided or limited by applicable law. Nothing in this Agreement is intended or should be construed to limit the remedies that otherwise would be available to the Parties in a court of law.

(i) Enforcement of Arbitration Decision/Judicial Procedure: The decision of the arbitrator may be enforced under the terms of the FAA to the maximum extent possible. Either party may have an arbitration decision enforced in a court of law in accordance with applicable the FAA. If this occurs, neither the arbitrator nor AAA will be involved in the court proceedings.

If a court determines that the decision is not completely enforceable, it will be enforced and binding on both parties to the maximum extent permitted by law.

8. SEVERABILITY: If any part of this Agreement is held to be void or unenforceable, the remainder of the Agreement will be enforceable and any part may be severed from the remainder as appropriate, to the extent permitted by law. For example, if a court determines that a particular provision of this Agreement is in conflict with a mandatory provision of applicable law in that jurisdiction, such provision(s) will not be enforced in that jurisdiction, but the exclusivity of the Agreement and its use of arbitration as the sole and exclusive forum for all Covered Claims within its scope shall not be affected. Except as expressly precluded by federal law, any dispute as to the arbitrability of a particular issue or claim pursuant to this Agreement is to be resolved in arbitration. Notwithstanding the foregoing, any issue concerning the validity of the class, collective, or representative or joint action waiver provided in Paragraph 4 of this Agreement must be decided by a court with jurisdiction over the Parties, and an arbitrator does not have authority to consider the issue of the validity of the waiver. If for any reason the class, collective, or representative or joint action waiver is found to be unenforceable, the class, collective, or representative or joint action may only be heard in court and may not be arbitrated under this Agreement.

9. AMENDMENT OR TERMINATION OF AGREEMENT: JPMorgan Chase reserves the right to amend, modify or discontinue this Agreement at any time in its sole discretion to the extent permitted by applicable law. Such amendments may be made by publishing them on the JPMorgan Chase Intranet or by separate notification to me and shall be effective 30 calendar days after such amendments are provided to me and will apply on a going-forward basis only. Amendment, modification or discontinuation of the Agreement will not affect pending arbitration proceedings. Continuation of my employment after receiving such amendments or modifications will be considered my acceptance of the amended terms.

This Agreement does not alter the voluntary ("at will") nature of my employment relationship with the Firm, nor does it afford any rights or remedies not otherwise available under applicable law. Of course, this Agreement does not require that JPMorgan Chase initiate arbitration before taking corrective action of any kind, including termination of employment.

This Attachment is incorporated into and made part of the Offer Letter for Browne, Alexander C. dated 11-Aug-2023.

Notice and Acknowledgement of Pay Rate and Payday
Under Section 195.1 of the New York State Labor Law
Notice for Exempt Employees

You are being provided with the following information pursuant to New York State Labor Code Section 195.1. Once you have reviewed this information, please sign and date.

Employer Information
Name: JPMorgan Chase Bank, N.A
Hiring employer is not a staffing agency/business
Doing Business As (DBA) Name(s): J.P.Morgan, Chase, JPMorgan Chase
Physical Address of Main Office: 1111 Polaris Parkway, Columbus, OH 43240
Mailing Address: 1111 Polaris Parkway Columbus, OH 43240
Phone: 1-877-576-2427

Proposed Start Date Jul-2024

Pay Information

- During your initial training period, you will be paid on an hourly basis. If you work more than 40 hours in a workweek, you will be eligible for overtime at an anticipated rate of $33.93 per hour. Your overtime rate may vary based on incentives that may be included in your base rate calculations.
- Once you complete your initial training period, you will be exempt from overtime and paid consistent with the firm's policies at an annualized base salary rate of $100,000.00
- Your regularly scheduled Pay Dates will be the 15th and the last business day of each month.
- There will be no allowances taken during or after your training period.

You are an at-will employee and as such are not subject to an agreement guaranteeing employment for any period of time.

Employee Acknowledgement
On this day, I received notice of my pay rate, overtime rate (if eligible), allowances, and designated payday.

I also received the opportunity to contact the JP Morgan Chase & Co. Pre-Employment Team at 1-877-576-2427 to receive this notice in Chinese, Korean, Spanish or another language if English is not my primary language.

Browne, Alexander C.

Form W-2 Wage and Tax Statement 2023 OMB No. 1545-0008 Department of the Treasury - Internal Revenue Service

Copy B, To Be Filed With Employee's FEDERAL Tax Return

Control number: 107114066702

Employer identification number EIN: 13-4994650

Employer's name, address and ZIP code:
JPMorgan Chase Bank, National Association
1111 Polaris Parkway
Columbus, OH 43240

Employee's social security number: 178-80-9162

Employee's first name and init / Last name / Suffix:
Alexander C Browne
1215 Red Barn Road
Ambler, PA 19002

Employee's address and ZIP code

1 Wages, tips, other compensation	19924.25	2 Federal income tax withheld	2863.49
3 Social security wages	19924.25	4 Social security tax withheld	1235.30
5 Medicare wages and tips	19924.25	6 Medicare tax withheld	288.90
7 Social security tips		8 Allocated tips	
10 Dependent care benefits		11 Nonqualified plans	
12a		12b	
12c		12d	

13 Statutory Employee ☐ Retirement Plan ☐ Third-party sick pay ☐

14 Other: NY State Wages 19924.25; NY SDI 6.50; NYFLI_EE 90.66

15 State	Employer's state ID number	16 State wages, tips etc.	17 State income tax	18 Local wages, tips etc.	19 Local income tax	20 Locality name
NY	1349946501	19924.25	1139.20			
PA	10963890			19924.25	750.43	Philadelphia

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

01851110130800584800020000000

Form W-2 Wage and Tax Statement 2023 OMB No. 1545-0008 Department of the Treasury - Internal Revenue Service

Copy C, For EMPLOYEE'S RECORDS (See Notice to Employee on back of Copy B)

Control number: 107114066702

Employer identification number EIN: 13-4994650

Employer's name, address and ZIP code:
JPMorgan Chase Bank, National Association
1111 Polaris Parkway
Columbus, OH 43240

Employee's social security number: 178-80-9162

Employee's first name and init / Last name / Suffix:
Alexander C Browne
1215 Red Barn Road
Ambler, PA 19002

Employee's address and ZIP code

1 Wages, tips, other compensation	19924.25	2 Federal income tax withheld	2863.49
3 Social security wages	19924.25	4 Social security tax withheld	1235.30
5 Medicare wages and tips	19924.25	6 Medicare tax withheld	288.90
7 Social security tips		8 Allocated tips	
10 Dependent care benefits		11 Nonqualified plans	
12a		12b	
12c		12d	

13 Statutory Employee ☐ Retirement Plan ☐ Third-party sick pay ☐

14 Other: NY State Wages 19924.25; NY SDI 6.50; NYFLI_EE 90.66

15 State	Employer's state ID number	16 State wages, tips etc.	17 State income tax	18 Local wages, tips etc.	19 Local income tax	20 Locality name
NY	1349946501	19924.25	1139.20			
PA	10963890			19924.25	750.43	Philadelphia

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Form W-2 Wage and Tax Statement 2023 OMB No. 1545-0008 Department of the Treasury - Internal Revenue Service

Copy 1, To Be Filed With Employee's State, City, or Local Income Tax Return

Control number: 107114066702

Employer identification number EIN: 13-4994650

Employer's name, address and ZIP code:
JPMorgan Chase Bank, National Association
1111 Polaris Parkway
Columbus, OH 43240

Employee's social security number: 178-80-9162

Employee's first name and init / Last name / Suffix:
Alexander C Browne
1215 Red Barn Road
Ambler, PA 19002

Employee's address and ZIP code

1 Wages, tips, other compensation	19924.25	2 Federal income tax withheld	2863.49
3 Social security wages	19924.25	4 Social security tax withheld	1235.30
5 Medicare wages and tips	19924.25	6 Medicare tax withheld	288.90
7 Social security tips		8 Allocated tips	
10 Dependent care benefits		11 Nonqualified plans	
12a		12b	
12c		12d	

13 Statutory Employee ☐ Retirement Plan ☐ Third-party sick pay ☐

14 Other: NY State Wages 19924.25; NY SDI 6.50; NYFLI_EE 90.66

15 State	Employer's state ID number	16 State wages, tips etc.	17 State income tax	18 Local wages, tips etc.	19 Local income tax	20 Locality name
NY	1349946501	19924.25	1139.20			
PA	10963890			19924.25	750.43	Philadelphia

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

Form W-2 Wage and Tax Statement 2023 OMB No. 1545-0008 Department of the Treasury - Internal Revenue Service

Copy 2, To Be Filed With Employee's State, City, or Local Income Tax Return

Control number: 107114066702

Employer identification number EIN: 13-4994650

Employer's name, address and ZIP code:
JPMorgan Chase Bank, National Association
1111 Polaris Parkway
Columbus, OH 43240

Employee's social security number: 178-80-9162

Employee's first name and init / Last name / Suffix:
Alexander C Browne
1215 Red Barn Road
Ambler, PA 19002

Employee's address and ZIP code

1 Wages, tips, other compensation	19924.25	2 Federal income tax withheld	2863.49
3 Social security wages	19924.25	4 Social security tax withheld	1235.30
5 Medicare wages and tips	19924.25	6 Medicare tax withheld	288.90
7 Social security tips		8 Allocated tips	
10 Dependent care benefits		11 Nonqualified plans	
12a		12b	
12c		12d	

13 Statutory Employee ☐ Retirement Plan ☐ Third-party sick pay ☐

14 Other: NY State Wages 19924.25; NY SDI 6.50; NYFLI_EE 90.66

15 State	Employer's state ID number	16 State wages, tips etc.	17 State income tax	18 Local wages, tips etc.	19 Local income tax	20 Locality name
NY	1349946501	19924.25	1139.20			
PA	10963890			19924.25	750.43	Philadelphia

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

TD Bank
America's Most Convenient Bank®

T **STATEMENT OF ACCOUNT**

AV 01 169152 23570H362 A**5DGT

ALEXANDER C BROWNE
1215 RED BARN RD
LOWER GWYNEDD PA 19002-1277

Page:	1 of 2
Statement Period:	Jan 01 2024-Mar 31 2024
Cust Ref #:	6794851626-056-T-0
Primary Account #:	00006794851626

169152 1/1

TD Simple Savings

ALEXANDER C BROWNE

Account # 00006794851626

ACCOUNT SUMMARY

Beginning Balance	33,934.12	Interest Earned This Period	1.69
Other Credits	1.69	Interest Paid Year-to-Date	1.69
		Annual Percentage Yield Earned	0.02%
Ending Balance	33,935.81	Days in Period	91

DAILY ACCOUNT ACTIVITY

Other Credits

POSTING DATE	DESCRIPTION	AMOUNT
01/31	INTEREST PAID	0.57
02/29	INTEREST PAID	0.54
03/31	INTEREST PAID	0.58
	Subtotal:	1.69