



# School Services

PROPOSAL FOR ACCOUNTING AND ADVISORY SERVICES  
ROYALTON PUBLIC SCHOOLS



# Welcome and Introduction

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We are excited about the opportunity to be a part of your team! We have high interest and energy ready to contribute to your success.

We are different than other School Service accounting and financial advisory service providers. It starts with a passion for working with Schools and having the talent to execute. Our Creative Planning Business Services team of professionals have rich backgrounds working in accounting and financial advisory services. We also bring business experiences beyond finance. Above all, our team brings unique chemistry and desire to make a difference, along with a history to back it up.

We are your partner and will provide you with the facts, figures and information you will need to make good business decisions. With a great team in place, you can focus on the educational program and meeting the needs of your students!

Here are a few benefits of working with Creative Planning Business Services:

- ◆ **School experience.** Creative Planning Business Services' dedicated School Services industry group provides accounting and financial advisory services to over 60 Schools. We support our client Schools with comprehensive accounting and financial advisory services including budgeting, financial accounting of state and federal grants, processing monthly accounting information including preparation of comprehensive interim financial statements and preparing accounting records for the annual financial audit.
- ◆ **In-depth knowledge of School accounting and tax regulations.** Our team stays abreast of the latest developments in Schools through ongoing third-party continuing education classes and extensive technical literature maintained in-house. Members of our team and firm are involved with MDE, MASBO, and other School supported organizations. We also keep you informed of upcoming regulations and the potential impact on your School, such as GASB's new financial reporting rules.
- ◆ **Effective communication.** Creative Planning Business Services has set high internal standards for responding and communicating with our clients. Providing support exactly when and where you need it is the value our team brings. Your time is valuable; we will be clear and efficient in our communications, work to eliminate surprises and meet agreed-upon deadlines. We have a proven track record of performing clients' requests based on their preferred timetable and delivering reports to our clients in advance of deadlines.
- ◆ **Innovative thinking and solutions driven.** When working with Creative Planning Business Services, clients find that we focus on earning their trust by being actively involved and focused on helping them be successful in all they do. We solve problems. Whether that problem is technology, financial or operations related, we will find a way to help.

It is our proven business model and processes that allow us to provide the highest level of value and performance to our clients.

Warmest regards,

*Joline Raymond*

Head of School Services

[Joline.Raymond@creativeplanning.com](mailto:Joline.Raymond@creativeplanning.com) | 952-563-6833

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# Firm Profile

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We have an extensive background working with clients through a strategic approach; we don't just keep pace with the trends; we stay ahead of the curve. We explore new ways to innovate and operate more efficiently.

## Who We Are

### CREATIVE PLANNING BUSINESS SERVICES

Creative Planning Business Services is the business advisory arm of Creative Planning that provides a comprehensive suite of services to support and empower businesses and their owners. Our values drive our decisions, and our passion is putting our clients at the center of everything we do.

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DELIVERING BUSINESS SERVICES THAT INNOVATE AND INSPIRE

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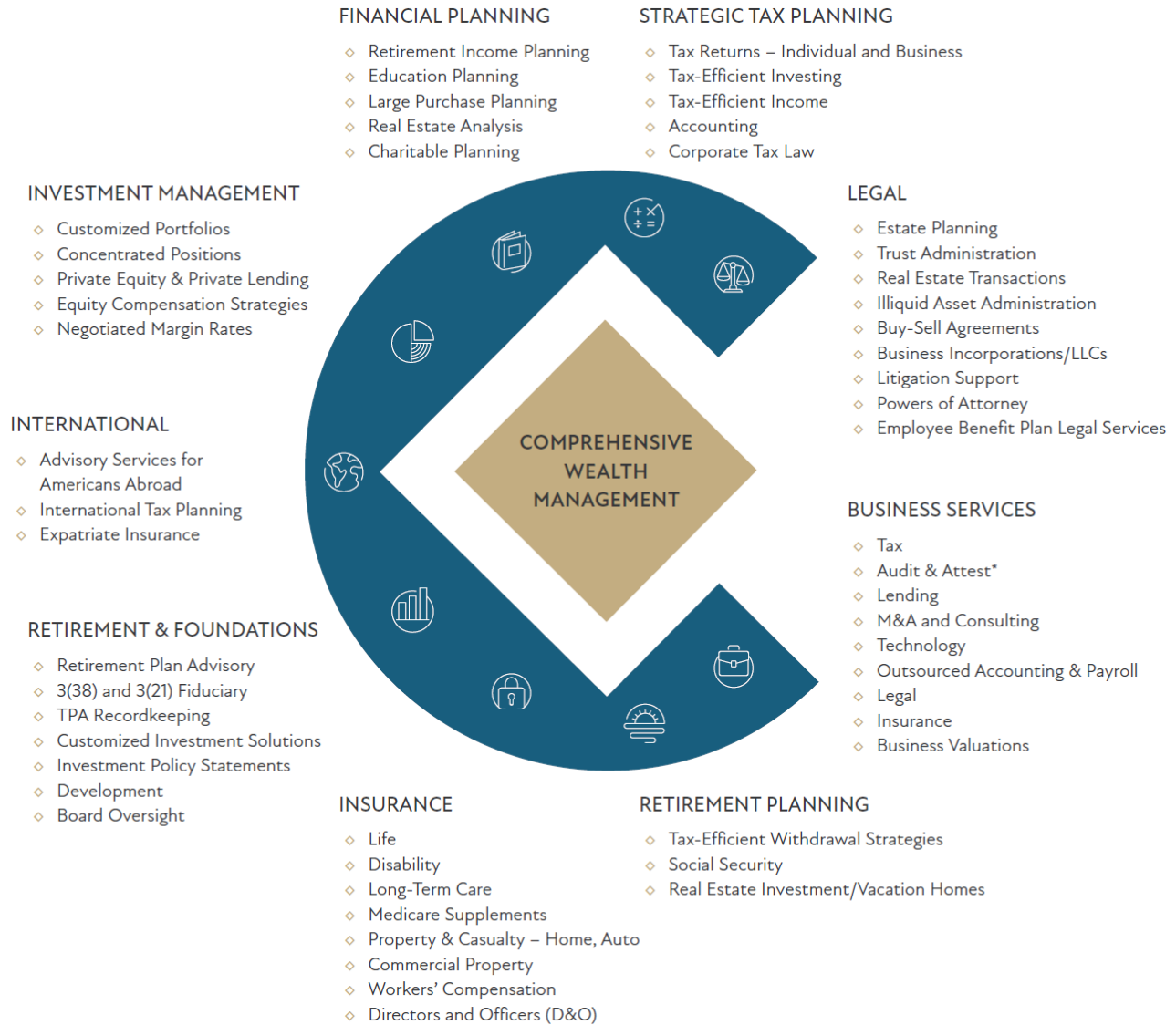
## Why We Do It

### TRANSFORMING BUSINESS. TRANSFORMING LIVES.

To transform the lives and businesses of every human we meet through thought leadership, meaningful connections and the most client-centric approach while building an ecosystem powered by people that aspire to make the world a better place.

## Our Services

### COMPREHENSIVE SUITE OF SERVICES



## Creative Planning Cares

### COMMUNITY INVOLVEMENT

Every day, Creative Planning helps clients achieve financial freedom and exceed their business objectives. But there are many individuals and organizations within our communities that are underserved or don't have access to the resources they need. For the last 20 years, our giving has been focused on those among us who need that support while they work through tough times or simply need a little assistance to give them a better chance of success.

#### Giving Back

Creative Planning opened Pathway Financial Education in the historic 18th & Vine area of Kansas City, Missouri.

The center offers free classes to small business owners, adults and youth, and many of Creative Planning's employees teach courses in financial planning, tax services, law, business management, and more.

## Recognized as a 2023 Charitable Champion



### CHARACTER

**HONESTY:** We are upfront and truthful, and we own our mistakes.

**KINDNESS:** We treat people internally and externally with respect and kindness regardless of their status or whether we agree with them.

**SELFLESSNESS:** We seek what is best for the client. They are the first priority, then Creative Planning.

### PASSION

**POSITIVE:** We are tenacious and tackle hard problems with a positive attitude.

**IMPACT:** We create results by focusing on what's important and giving a strong performance.

**OWNERSHIP:** We see everything through until it's completed.

### TEAMWORK

**URGENCY:** We move quickly and with purpose. Things don't stay with us for long.

**HIGH-PERFORMING:** We strive to be a high-performing team to achieve excellence.

### GROWTH

**OURSELVES:** We strive to provide exceptional work and pursue growth opportunities.

**COMPANY:** We care intensely about Creative Planning's success.

# School Accounting and Advisory Proposed Services

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## Budgeting

- ◆ Develop a five-year operating budget in sync with the School's program.
- ◆ Monitor the budget vs. actual to determine when budget revisions are necessary.
- ◆ Monitor the budget to verify the School is receiving all available funding to ensure they are maximizing their revenues.

## Financial Reporting

- ◆ Month end closing including bank statement reconciliation and any related journal entries.
- ◆ Prepare and provide monthly financial reports and supplemental information.
- ◆ Continually analyze account activity to ensure the budget correctly reflects the School's operations.
- ◆ Review and analyze cash flow projections.

## Audit Preparation Services

- ◆ Coordinate the audit process directly with your respective audit firm.
- ◆ Prepare all required audit files and supporting workpapers for the annual audit.
- ◆ Enter and review all year end accrual entries and ensure accurate financial reporting.
- ◆ Provide audit status reports to administration.
- ◆ Ensure all reports are submitted by mandated deadlines.

## Grant Advisory & Accounting

- ◆ Review and monitor state and federal programs that require reimbursement through the MN Department of Education's reimbursement reporting system (SEDRA - State Special Education and MEGS - Federal Programs).
- ◆ Verify that the coding in the finance system matches SEDRA and MEGS.
- ◆ Process and maintain all necessary grant financial reports.
- ◆ Provide ongoing analysis on reasonability of grant expenditures to guarantee allowability.
- ◆ Assist with grant specific audits.

## Other Services Performed Which Are Included In Our Proposal

- ◆ Submit enrollment/average daily membership (ADM) estimates directly to MDE (starting in fourth year of School operations).
- ◆ Attend meetings with School leadership, as needed; monthly finance committee meetings; and board meetings, as needed.

# Meet Our School Services Leadership and Transition Team

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Creative Planning Business Services (CPBS) has a dedicated School Services leadership and transition team to meet your School's unique needs. These individuals are instrumental in ensuring we deliver exceptional service and you receive best in class experience throughout our partnership.



**BRIDGET MERRILL-MYHRE, CPA, MANAGER, PUBLIC SCHOOL SERVICES**

Bridget has over 15 years of School business experience and two years of Big Four tax experience. She has a track record of budget and audit accuracy and deep knowledge of GASB and internal controls/standards along with superior technical accounting skills. Bridget has success in cash flow analysis, strategic budget development, as well as grant management with several public School districts. She earned her bachelor's degree in accounting from the University of Iowa and her MBA from St. Cloud State University. Outside of work, Bridget is an avid runner and enjoys being outdoors spending time with her husband and two sons.



**JOLINE RAYMOND, MANAGER OF ACCOUNTING, SCHOOL SERVICES**

Joline is an experienced accounting supervisor with a demonstrated history of working in the educational accounting industry. Joline's specialty is accounts payable and payroll. She uses her expertise to lead and help her team with daily problem solving and is constantly looking for ways to improve processes and procedures to benefit clients and staff alike. She enjoys working side-by-side with her team to help clients take the worry out of their day-to-day office duties, whether it is accounts payable, payroll, grant management or budgeting which enables them to focus on the students they serve. Joline holds an associate degree in business administration from Rasmussen College. Outside of work, Joline is involved with Simley Wrestling and Randolph Rockets Softball.



**JENNY ABBS, SENIOR ADVISOR, SCHOOL SERVICES**

Jenny has been working in Schools for over 20 years and focuses her attention on helping Schools leverage funding source opportunities available to them. Jenny’s favorite part of her job is training others and helping break down complex topics in a way that all can understand. In her role, she works closely with School board members who may not have a financial background, so her passion for helping others enables everyone involved in the decision-making process to be on the same page. Jenny holds a bachelor’s degree in business management from St. Cloud State University. Outside of work, you can find Jenny volunteering as a youth basketball coach or relaxing with her family at their favorite campground.



**LISA THIELBAR, PAYROLL SUPERVISOR, SCHOOL SERVICES**

Lisa leads the payroll team to ensure client satisfaction, as well as, employee satisfaction. She has a passion for training both team members and clients to understand all aspects of the payroll process. In her role she problem solves along with her team to ensure accuracy while creating efficiencies for both the payroll team and our clients! It is the team’s goal to ease the minds of our clients, so they don’t have to worry about their payroll. Lisa earned her bachelor’s degree in business from the University of Wisconsin - River Falls. She volunteers for Farmington Baseball.



**JEN KLOS, ACCOUNTS PAYABLE SUPERVISOR, SCHOOL SERVICES**

Jen leads the School Services accounts payable team. Her focus is on training and elevating the AP staff, while also working with staff and Schools to streamline processes. Jen has a passion for leveraging technology to find efficiencies in AP and AR workflows. She enjoys helping clients find solutions that can put time back in their jam-packed days and enabling her team to serve with unmatched commitment and quality. Jen has over 10 years of experience in AP, and finance banking. Outside of work, Jen likes to spend her time volunteering with organizations like Ruby’s Pantry, being active with her family, biking, paddle boarding and hosting game night with friends.



**MELISSA CHRISTIANSON, GRANT ADVISOR SUPERVISOR, SCHOOL SERVICES**

Melissa is an experienced supervisor with over 10 years of educational accounting experience, with a strong background in accounts payable and grant advising. A proven problem solver, Melissa takes pride in working collaboratively with her team to maximize the impact of federal and state grants—ensuring they best support clients and the children they serve. She holds a degree in Hospitality and Tourism Management from the University of Wisconsin-Stout, a foundation that has shaped her detail-oriented and people-focused approach. Outside of work, Melissa enjoys reading and traveling with her husband and their two children.

# School Accounting and Advisory Services Fee Proposal

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## Fees

- ◆ Annual on-going financial services will start at \$5,500 per month, beginning on an agreed upon date for the School accounting and advisory
  - Onsite attendance for Finance and Board meetings
  - Two monthly onsite office days per month coinciding with Finance and Board meetings
  - Five Dedicated virtual office hours on weeks without onsite visits
  
- ◆ One-time fee for the assessment, transition and onboarding, will be \$4,500 and will include the following services:
  - Assessment of School's accounting records
  - Assist in transitioning from your current provider

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**SCHEDULE A – Outsourced Accounting & Advisory Services**

<b>Client</b>	Royalton Public Schools		
<b>Service Provider</b>	Creative Planning Business Accounting Services, LLC		
<b>Agreement Number</b>	Schedule A		
<b>Start Date</b>	TBD		
<b>Terms</b>	On-going per Professional Services Agreement		
<b>Description of Services</b>	Creative Planning Business Accounting Services, LLC shall provide the following services (collectively, the "Services"):		
	<b>Service</b>	<b>Frequency</b>	<b>Investment</b>
	<b>Monthly Outsourced Accounting Services Package</b>	<b>Monthly</b>	<b>\$5,500</b>
	<p><b>Grant Accounting –</b></p> <ul style="list-style-type: none"> <li>Review and monitor state and federal grants that require reimbursement through the MN Department of Education’s reimbursement reporting system (SEDRA – State Special Education and MEGS/SERVS – Federal Programs).</li> <li>Verify that the coding in the finance system matches SEDRA and MEGS/SERVS.</li> <li>Process and maintain all necessary grant financial reports.</li> <li>Includes the following recurring grants – Title &amp; Federal Special Ed.</li> </ul> <p><b>Other monthly accounting –</b></p> <ul style="list-style-type: none"> <li>Develop and maintain a five-year operating budget in sync with the client’s program.</li> <li>Monitor the budget vs. actual to determine when budget revisions are necessary.</li> <li>Monitor the budget to verify the client is receiving all available funding to ensure they are maximizing their revenue.</li> <li>Month end closing and enter any related journal entries.</li> <li>Bank statement reconciliation.</li> <li>Prepare and provide monthly financial reports and supplemental information.</li> <li>Review and analyze monthly cash flow projections.</li> <li>Submit enrollment/average daily membership (ADM) estimates directly to MDE (starting in fourth year of operations).</li> <li>Annual/quarterly sales tax reporting.</li> </ul>		
	<b>Onboarding/ Transition Services (See Notes Below)</b>	<b>One-Time</b>	<b>\$4,500</b>
	<b>Audit and Tax Return Preparation</b>	<b>Annually</b>	<b>*</b>
	<ul style="list-style-type: none"> <li>Coordinate the audit/tax process directly with your respective audit firm.</li> <li>Prepare all required audit/tax files and supporting workpapers for the annual audit.</li> <li>Enter and review all year end accrual entries and ensure accurate financial reporting.</li> <li>Provide audit/tax status reports to administration.</li> <li>Ensure all reports are submitted by mandated deadlines.</li> </ul>		*This fee includes up to 100 hours of audit prep services. If more hours are needed, the client will be charged at standard hourly rates.

Service	Frequency	Investment
<b>Grant/SPED Advisory Services</b>		
<ul style="list-style-type: none"> <li>Meetings with client and/or other client representatives.</li> <li>Grant/SPED updates requested by client and/or other client representatives.</li> </ul>		
<b>Controller/Senior Advisory Services</b>		
<ul style="list-style-type: none"> <li>Meetings with client and/or other client representatives.</li> <li>Budget updates requested from client.</li> </ul>		
<b>Additional Services</b>		
<ul style="list-style-type: none"> <li>Grant assistance for other grants (Federal REAP Grant, Federal Stimulus Grants, etc.)</li> </ul>	<b>Per grant annually</b>	<b>5% of total expenditures, or \$2,500, whichever is less.</b>
<ul style="list-style-type: none"> <li>Board Finance Training</li> </ul>	<b>Per training</b>	<b>\$1,150 (in-person) \$750 (virtual)</b>
<ul style="list-style-type: none"> <li>ACA Compliance Processing and Forms</li> </ul>	<b>Annually</b>	<b>\$1,500</b>
<b>Statutory Operating Debt Services</b> <ul style="list-style-type: none"> <li><i>In conjunction with the MN Department of Education, we will provide planning and budget development services for the Statutory Operating Debt Budget. This service will be billed at a monthly fee of \$500 and remain in place until the SOD status is removed.</i></li> </ul>	<b>Monthly</b>	<b>\$500</b>
<ul style="list-style-type: none"> <li>Cash Flow Monitoring (if School is less than 20 days cash on hand)</li> </ul>	<b>Hourly</b>	<b>Standard Billing Rates</b>
<ul style="list-style-type: none"> <li>Bank Transition</li> </ul>	<b>Hourly</b>	<b>Standard Billing Rates</b>
<ul style="list-style-type: none"> <li>Time Off/Time Tracker Assistance</li> </ul>	<b>Hourly</b>	<b>Standard Billing Rates</b>
<ul style="list-style-type: none"> <li>Grant and Special Education Monitoring</li> </ul>	<b>Hourly</b>	<b>Standard Billing Rates</b>

<b>Additional services that may be added:</b>	<p><b>Additional services that may be added (for temporary or long term engagement):</b></p> <ul style="list-style-type: none"> <li>Payroll Services</li> <li>Accounts Payable Processing and Coding</li> <li>Financial forecast assistance when the client is preparing for a purchase of building, expansion, and/or replication.</li> </ul>
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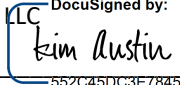
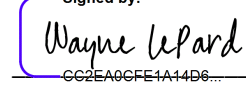
<b>Service Notes:</b>	<p><b>See Appendix A – Services &amp; Expectations Rubric Attached</b></p> <p><b>Onboarding/ Transition Services Notes:</b></p> <ul style="list-style-type: none"> <li>Creative Planning will collaborate with the School and the prior service provider to ensure a seamless transition of accounting services. This shall include, but not be limited to, the review, reconciliation, and balancing of the chart of accounts to ensure accuracy and compliance with Minnesota Department of Education (MDE) reporting requirements; comprehensive budget analysis and refinement; review of Special Education, Title, and other ancillary grant programs to ensure proper accounting and compliance; and the performance of any additional accounting functions necessary to support accurate and efficient financial operations.</li> </ul> <p><b>Special Notes:</b></p> <ul style="list-style-type: none"> <li>Any additional scope not specifically defined in this schedule of services will be communicated, requested, confirmed, and billed at standard billing rates.</li> <li>Changes or alterations to this agreement require approval by both parties and mutually agreed upon time frame.</li> </ul>
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This Schedule A shall remain confidential between Royalton Public Schools and Creative Planning Business Accounting Services, LLC.

The parties agree that this Service Schedule Agreement incorporates the [Professional Services Terms & Conditions](#) (the "Terms") (collectively, the "Agreement"), all of which shall remain confidential between Client and Creative Planning Business Accounting Services, LLC (or related affiliate/s identified herein). By signing this Service Schedule Agreement, Client acknowledges and agrees that Client has had an ample opportunity to review the terms contained in the Agreement. Client further agrees that Client has had the opportunity to obtain legal counsel and through Client's own determination, with or without counsel, accepts this Agreement.

The undersigned represent and warrant they are authorized signers for their respective organizations.

For and on behalf of Creative Planning Business Accounting Services, LLC		For and on behalf of Client	
DocuSigned by:	Signed by:		
Signature		Signature	
Contact Name	<u>Kim Austin</u>	Contact Name	<u>Wayne LePard</u>
Title	<u>Solution Sales Leader</u>	Title	<u>Superintendent</u>
Date	<u>10/31/2025</u>	Date	<u>10/31/2025</u>

## Certificate Of Completion

Envelope Id: CD5D57D9-463B-475E-B1ED-6A1033001DD1	Status: Completed
Subject: Complete with Docusign: Royalton Public Schools - CP School Services Proposal.pdf	
Hays Business:	
BerganKDV Retirement Solutions:	
Client:	
Agreement Number:	
Start Date:	
Source Envelope:	
Document Pages: 14	Signatures: 2
Certificate Pages: 5	Initials: 0
AutoNav: Enabled	Envelope Originator:
Envelopeld Stamping: Enabled	Kim Austin
Time Zone: (UTC-08:00) Pacific Time (US & Canada)	1254 Macey Way
	Stillwater, MN 55082
	kim.austin@creativeplanning.com
	IP Address: 47.158.238.176

## Record Tracking

Status: Original 10/31/2025 8:19:12 AM	Holder: Kim Austin kim.austin@creativeplanning.com	Location: DocuSign
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## Signer Events

Kim Austin  
kim.austin@creativeplanning.com  
Security Level: Email, Account Authentication (None)

## Signature

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Signature Adoption: Pre-selected Style  
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## Electronic Record and Signature Disclosure:

Not Offered via Docusign

Wayne LePard  
wayne.lepard@isd485.org  
Superintendent  
Security Level: Email, Account Authentication (None)

Signed by:  
  
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Signature Adoption: Pre-selected Style  
Using IP Address: 96.3.254.18

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Editor Delivery Events	Status	Timestamp
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Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp

<b>Envelope Summary Events</b>	<b>Status</b>	<b>Timestamps</b>
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Completed	Security Checked	10/31/2025 8:48:10 AM

<b>Payment Events</b>	<b>Status</b>	<b>Timestamps</b>
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**Electronic Record and Signature Disclosure**

## **ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

From time to time, BerganKDV Wealth Management (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to this Electronic Record and Signature Disclosure (ERSD), please confirm your agreement by selecting the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

### **Getting paper copies**

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after the signing session and, if you elect to create a DocuSign account, you may access the documents for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

### **Withdrawing your consent**

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

### **Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

### **All notices and disclosures will be sent to you electronically**

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

### **How to contact BerganKDV Wealth Management:**

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: [sdesrosier@kdv.com](mailto:sdesrosier@kdv.com)

### **To advise BerganKDV Wealth Management of your new email address**

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at [sdesrosier@kdv.com](mailto:sdesrosier@kdv.com) and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

If you created a DocuSign account, you may update it with your new email address through your account preferences.

### **To request paper copies from BerganKDV Wealth Management**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to [sdesrosier@kdv.com](mailto:sdesrosier@kdv.com) and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

### **To withdraw your consent with BerganKDV Wealth Management**

To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an email to [sdesrosier@kdv.com](mailto:sdesrosier@kdv.com) and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

### **Required hardware and software**

The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here: <https://support.docusign.com/guides/signer-guide-signing-system-requirements>.

### **Acknowledging your access and consent to receive and sign documents electronically**

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please confirm that you have read this ERSD, and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format as described herein, then select the check-box next to ‘I agree to use electronic records and signatures’ before clicking ‘CONTINUE’ within the DocuSign system.

By selecting the check-box next to ‘I agree to use electronic records and signatures’, you confirm that:

- You can access and read this Electronic Record and Signature Disclosure; and
- You can print on paper this Electronic Record and Signature Disclosure, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access; and
- Until or unless you notify BerganKDV Wealth Management as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by BerganKDV Wealth Management during the course of your relationship with BerganKDV Wealth Management.