



Legal

Last Updated: August 2025

Please read these terms and conditions carefully.

Mason Investment Advisory Services, Inc. (along with Mason International, Inc. and affiliated companies, collectively "Mason") maintain this website, ("website"), for the convenience of its clients and prospective clients.

Terms and Conditions of Use:

Access to and use of the website is subject to the following terms and conditions, which may be revised at any time and for any reason by Mason. Your continued use of the website following such revisions will be conclusively deemed acceptance of any changes to these terms and conditions. You agree that notice of changes to these terms and conditions posted on the website constitutes reasonable and sufficient notice. At all times, you are bound by the then-current version of the terms and conditions.

By registering for, logging into, visiting and/or otherwise using the website in any way, you indicate that you accept the terms and conditions as set forth herein and agree to be legally bound by them. If you do not agree to these terms and conditions, please do not access this website or any pages thereof. You represent and warrant that you will not use this website for any purpose that is unlawful or prohibited by these terms and conditions.

Website Content:

The information contained on the pages of this website is subject to modification and update from time to time without notice. All content is presented as of the date published or indicated, and may be superseded by subsequent market events or for other reasons. Although Mason makes every attempt to provide accurate and timely information, Mason does not guarantee or ensure the accuracy, completeness, currency, or authenticity of any website content or functionality, or transmission of any website content from the website to you.

Mason may establish links between this website and one or more websites operated by third parties. Other websites that may be accessed from or provide access to this website by hypertext links are entirely independent of this website, and Mason does not exercise control over any such other websites, the contents therein, or the products/services offered. The existence of any such links shall not constitute an endorsement or representation or warranty by Mason regarding

such websites, the contents of the websites, the products or services of the websites, or the operators of the websites. Mason disclaims responsibility for the privacy policies and customer information practices of third-party internet websites hyperlinked from its website.

Information Provided Is Not Advice:

The website is designed to provide information about Mason and its products and services ("Information") to a variety of audiences. The content contained in these pages is for information purposes only and is not intended to be, and is not a substitute for, professional financial, tax or legal advice. You should not make any decision, financial or otherwise, based on any of the Information on the Mason website without undertaking your own due diligence. You agree that any and all use of the Information, which you make, is solely at your own risk and without recourse to Mason, its officers, directors, employees, agents, or affiliates.

Nothing contained herein constitutes an offer, solicitation, or recommendation regarding any investment management product or service, or the offer to sell or the solicitation of an offer to buy any security; nor shall any such services be provided, or securities be offered or sold, in any jurisdiction in which such an offer, solicitation, provision, or sale would be unlawful. The investments and strategies discussed on the website may not be suitable for all investors.

Grant of Limited License:

Mason grants to you a limited, personal, non-exclusive, non-transferable license to use, display on your computer, download and print short extracts of the Information for your own personal and non-commercial purposes only. You may not copy, distribute or redistribute the data, including by caching, framing or similar means or sell, resell, re-transmit or otherwise make the data retrieved from our website available in any manner to any third party. Any unauthorized use of this website or the data on this website will terminate the permission granted herein and may violate applicable laws, including copyright law, trademark law, and commercial regulations and statutes.

No Relationship:

Mason is an independent contractor and not an agent of you in the performance of these terms and conditions. These terms and conditions are not to be interpreted as evidence of an association, joint venture, partnership, or franchise between the parties.

Disclaimer of Warranties:

EXCEPT AS EXPRESSLY SET FORTH HEREIN, AND REGARDLESS OF ANY ADVERTISEMENTS, PROMISES OR AFFIRMATIONS OF MASON, ITS EMPLOYEES, DIRECTORS, AGENTS, AFFILIATES, OR THIRD PARTIES TO THE CONTRARY, MASON HEREBY DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, RELATING TO THE QUALITY, COMPLETENESS, TIMELINESS, APPROPRIATENESS, OR SUITABILITY OF THE INFORMATION ON THE WEBSITE OR OF ANY INFORMATION ON THE WEBSITE, OR THE RESULTS OF ANY USE THEREOF OR RELIANCE THEREON, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF NON-INFRINGEMENT, QUIET ENJOYMENT, MERCHANTABILITY AND ACCURACY. THERE IS NO WARRANTY THAT THE INFORMATION ON THE WEBSITE WILL FULFILL ANY OF YOUR PARTICULAR PURPOSES, NEEDS, OR REQUIREMENTS. YOU FURTHER ACKNOWLEDGE AND AGREE THAT (I) NO OTHER REPRESENTATIONS OR WARRANTIES

HAVE BECOME PART OF THE BASIS OF THE BARGAIN BETWEEN THE PARTIES RELATING TO THE USE OF THE WEBSITE OR ANY INFORMATION ON THE WEBSITE AND (II) YOU HAVE NOT RELIED ON ANY AFFIRMATIONS OF FACT, REPRESENTATIONS, PROMISES OR OTHER COMMITMENTS RELATING TO THE WEBSITE OR INFORMATION ON THE WEBSITE OTHER THAN AS EXPRESSLY SET FORTH HEREIN.

Limitation of Liability:

THE WEBSITE AND INFORMATION IS PROVIDED "AS IS." NEITHER MASON, ITS EMPLOYEES, DIRECTORS, AGENTS, AFFILIATES NOR ANY THIRD PARTY SHALL BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT, INDIRECT, OR CONSEQUENTIAL, ARISING FROM (I) ANY INACCURACY OR INCOMPLETENESS IN, OR DELAYS, INTERRUPTIONS, ERRORS OR OMISSIONS IN THE DELIVERY OF THE INFORMATION OR (II) ANY DECISION MADE OR ACTION TAKEN BY YOU OR ANY THIRD PARTY IN RELIANCE UPON THE INFORMATION. NEITHER WE NOR ANY THIRD PARTY SHALL BE LIABLE FOR LOSS OF BUSINESS REVENUES, LOST PROFITS OR ANY PUNITIVE, INDIRECT, CONSEQUENTIAL, SPECIAL OR SIMILAR DAMAGES WHATSOEVER, WHETHER IN CONTRACT, TORT OR OTHERWISE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES INCURRED BY YOU OR ANY THIRD PARTY.

Indemnity:

As a condition for your use of the website, you agree to indemnify, defend, and hold Mason and its subsidiaries, affiliates, officers, agents, and employees harmless from any direct and third party claims, and any related damages, losses, or costs (including reasonable attorney fees and costs), arising out of, related to, or in connection with your use of the website, your violation of these terms and conditions, or your violation of any rights of a third party.

Termination:

Mason may terminate your access to the website for any reason, without prior notice.

Electronic Communications — Not Confidential

Absent the use of encryption, the internet is not a secure method of communication and privacy cannot be ensured. Internet email is vulnerable to interception and forging. Mason will not be responsible for any damages you or any third party may suffer as a result of the transmission of confidential information that you may make to Mason through the internet, or that you expressly or implicitly authorize Mason to make, or for any errors or any changes made to any transmitted information.

Conformance With Applicable Law:

You agree that your use of this website will not violate any applicable local, national, or international law, including but not limited to any regulations having the force of law. Some jurisdictions may have restrictions on the use of the internet by their residents. You agree not to impersonate any person in your use of the website or the sending of any email to an address listed on the site.

Governing Laws:

This website is based in Reston, Virginia, and the laws of the Commonwealth of Virginia and the federal laws of the United States of America shall govern as to the interpretation, validity and effect of these Terms and any use of the website. The courts of the Commonwealth of Virginia shall have exclusive jurisdiction in any action or proceeding instituted under or related to these terms or your use of the website. The products and services referred to on this website are available only in jurisdictions where they may be lawfully offered for sale.