To Whom It May Concern,

This engagement letter confirms that WealthCounsel is an active client of Vanta's trust management platform, certifying the following;

- WealthCounsel has a Vanta subscription that includes continuous control monitoring.
- WealthCounsel has committed to produce a SOC 2 Type 2 Report, with the audit engagement having started on October 12, 2025.
- WealthCounsel's real-time security posture is visible at https://trust.wealthcounsel.com - this includes continuous control monitoring, security collateral, policies, and achieved compliance frameworks.

If you have further questions, please contact Vanta at support@vanta.com.

Sincerely,

Vanta