

"Ask First!" This form is to be filled out by any person who is offering legal, financial, retirement, insurance, accounting, estate, long-term care or similar planning services. Respond to **ALL** categories completely; sign and date at the bottom of the page.

MY EDUCATION- I have achieved the following level of education (check HIGHEST level achieved):

Some High School	Some College
GED	Bachelors Degree
High School Diploma	<input checked="" type="checkbox"/> Masters or Other Advanced Degree

MY CREDENTIAL(S)- I have the following specialized credential(s) and training:

CFP®

MY RELEVANT LICENSE(S)- I have the following license(s) giving me the legal authority to provide the services I am offering to you (bar license (attorney); securities license; insurance license):

License Type	Covers What Activities	Issued By	License No.

LEGAL SERVICES - (Check ONE)

- I DO NOT practice law, and the services I am offering to you do not involve practicing law.**
- I DO practice law, and have an active license to practice law in California.
 - I DO practice law, but DO NOT have an active license to practice law in California. I am, however, under the supervision of the following attorney who has an active license to practice law in California.

OUR BUSINESS RELATIONSHIP:

Fee only - fiduciary relationship

MY COMPENSATION:

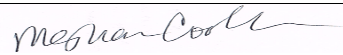
Way(s) I'll Be Paid:

Payment will be made by:

% of assets under management, flat rate or hourly - paid by client only

FINANCIAL PRODUCTS / AFFILIATED ORGANIZATIONS - Check TRUE or ***FALSE**:

I offer or sell annuities, insurance, mutual funds or other financial products; or I am, or my employer is, affiliated with a person or organization that offers or sells annuities, insurance, mutual funds or other financial products.

I certify under penalty of perjury that the responses herein are true to the best of my knowledge.	
Date: 9/20/2021	Business Name: Oak Street Advisory Group, LLC
Signature: 	Address: 1100 South Coast Hwy., Ste. 210, Laguna Beach, CA 92651
Print Name: Meghan Coolbaugh	Telephone: (949) 494-6820

A Non-Profit Information Resource for Older Adults HELP
 1404 Cravens Avenue
 Torrance, California 90501
 (310) 533-1996 Also free for Internet download at: <http://www.help4srs.org>
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 HELP designed the "ASK FIRST" form



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Oak Street Advisory Group, LLC is a fee-only firm committed to our fiduciary responsibility of offering objective advice. As a fee-only firm, we have no vested interest in the products or services we recommend, other than to ensure all recommendations meet a clients' objectives and goals. The only compensation we receive is directly from our clients, removing potential conflicts of interest with commission-based products or services.

Our mission is to help people navigate through the potentially complicated areas of investment management and financial planning. We are very proud to be a long-time presence in Laguna Beach and greatly value the close, long-term relationships we have built with our clients.