

7T2 CAPITAL Wealth Manager Add-On Charter

GAZZETTA UFFICIALE DELL'ORDINE SOVRANO MILITARE DI MALTA

OFFICIAL GAZETTE OF THE SOVEREIGN MILITARY ORDER OF MALTA (GUOSMM)

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7T2 CAPITAL Wealth Manager Add-On Charter

Section 1 — Scope

1.1 This Add-On Charter authorizes private-wealth, family-office, and discretionary managed-account services by 7T2 CAPITAL.

1.2 The charter is intended for high-touch advisory and portfolio-management services for eligible clients.

Section 2 — Permitted activities

2.1 Discretionary management of client portfolios.

2.2 Investment advice, asset allocation, and manager selection.

2.3 Consolidated reporting, portfolio monitoring, and rebalancing.

2.4 Coordination with external custodians, trustees, or administrators.

Section 3 — Restrictions

3.1 No retail mass-market solicitation unless separately authorized.

3.2 No pooled-fund VC or hedge authority unless separately published.

- 3.3 No custody, nominee, escrow, or safekeeping authority unless separately granted.
- 3.4 No execution or arranging authority unless expressly granted by another add-on.

Section 4 — Operating conditions

- 4.1 7T2 CAPITAL shall define eligible investor classes and suitability standards.
- 4.2 A suitability or appropriateness process is required where advice or discretionary mandates are offered.
- 4.3 Private-wealth mandates shall remain segregated from pooled-fund mandates.

Section 5 — Companion permissions

- 5.1 `activity.investment_adviser` if standalone advice is offered.
- 5.2 `activity.dealing_arranging` if order routing or execution is performed.
- 5.3 `activity.custody_nominee_escrow` if custody or asset control is performed.

Section 6 — Non-claims

- 6.1 This add-on does not create bank, broker-dealer, or depositary status.
- 6.2 This add-on does not create host-state wealth-management approval without local law closure.

Signing authority: Sovereign Military Order of Malta