



# INVESTMENT MANAGEMENT

OUR INVESTMENT MANAGEMENT FEES ARE DEDUCTED QUARTERLY IN ADVANCE FROM YOUR ACCOUNT AS FOLLOWS;

## TIERED FEE SCHEDULE

INVESTMENT PORTFOLIOS UNDER \$500,000	ANNUALIZED
\$5,000 MINIMUM FEE	1.40%
INVESTMENT PORTFOLIOS OVER \$500,000	
First \$0—\$500,000	1.15%
Next \$500,001—\$2,500,000	1.00%
Next \$2,500,001—\$5,000,000	.85%
Next \$5,000,001—\$10,000,000	.75%
Next \$10,000,001—\$20,000,000	.50%
Next \$20,000,001—\$35,000,000	.40%
Next \$35,000,001 +	TBD

**NOTES:**

1. The above fees for portfolios \$500,000 and over are consecutive. For example, your first \$500,000 will be at 1.15% then the next \$1,000,000 will be at 1.00% and so on.
2. In certain situations, additional fees may apply for non-managed accounts.
3. Care and Maintenance fee of .25% for assets held, monitored and included in overall asset allocation. This fee may be deducted from portfolio or paid as a flat fee with Financial Planning.
4. Portfolios in excess of \$5,000,000 have financial Planning included in the fee.

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