



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 |
|---------------------------------------|------------|
| First \$0—\$500,000 | 1.25% |
| INVESTMENT PORTFOLIOS OVER \$500,000 | ANNUALIZED |
| First \$0—\$1,000,000 | 1.00% |
| Next \$1,000,001—\$2,500,000 | .85% |
| Next \$2,500,001—\$5,000,000 | .75% |
| Next \$5,000,001—\$10,000,000 | .65% |
| Next \$10,000,001 + | .40% |

NOTES:

1. The above fees for portfolios over \$500,000 are consecutive. For example, your first \$1,000,000 will be at 1.00% then the next \$1,000,000 will be at .85% and so on.
2. In certain situations additional fees may apply for non-managed accounts, insurance products, custodial fees, Federal Express fees etc.
3. Portfolios in excess of \$3,000,000 have financial Planning included in the fee.

Braun-Bostich & Associates, Inc., 1600 Ashwood Drive, Suite 1601, Canonsburg PA 15317 | **Phone:** 724.942.2639 | **Fax:** 724.746.1782
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