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Investment Management

*Our investment management fees are deducted quarterly in advance from your account as follows:*

Tiered Fee Schedule Annualized

|  |  |
| --- | --- |
| $1,000,000—$2,500,000 | 1.00% (Minimum fee is $10,000) |
| Next $2,500,001—$4,000,000 | .85% |
| Next $4,000,001—$6,500,000 | .75% |
| Next $6,500,001—$10,000,000 | .65% |
| Next $10,000,001─$35,000,000 | .40% |
| Next $35,000,001 + | .35% |

 *NOTE: In certain situations, additional fees may apply for non-managed accounts.*

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

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