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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.*

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