



INVESTMENT MANAGEMENT

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

TIERED FEE SCHEDULE

ANNUALIZED

INVESTMENT PORTFOLIOS UNDER \$500,000	1.25%
	\$5,000 MINIMUM FEE
INVESTMENT PORTFOLIOS OVER \$500,000	
First \$0—\$1,000,000 <i>(assumes portfolio at or over \$500,000)</i>	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—\$20,000,000	.40%
Next \$20,000,001—\$35,000,000	.25%
Next \$35,000,001 +	TBD

NOTES:

1. Portfolios under \$500,000 will be charged 1.25% with a minimum fee of \$5,0000 (includes financial planning fee).
2. Portfolios over \$500,000 will be charged 1% up to \$1 million, .85% from \$1 mm to \$2.5mm etc.
3. In certain situations, additional fees may apply for non-managed accounts.
4. Billable portfolios in excess of \$5,000,000 have Financial Planning fee waived.

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