



Below you will find our tiered fee schedule. This schedule applies to our On-Going Financial Planning and Investment Management service level.

The minimum asset level for this service is \$350,000.

TIERED ACCOUNT FEE SCHEDULE		
FROM: (\$)	TO: (\$)	ANNUAL FEE (%)
\$0	\$999,999	1.00%
\$1,000,000	\$1,499,000	0.90%
\$1,500,000	\$2,500,000	0.75%
\$2,500,000+		0.50%