ATTLEBORO
WEALTH MANAGEMENT
INDEPENDENT FINANCIAL ADVICE

Client Fee Schedule

Assets Under Management (AUM)	Advisory Fee
$1,000,000 - $ 1,999,999	1.00%
$2,000,000 - $ 2,999,999	0.85%
$3,000,000 - $3,999,999	0.75%
$4,000,000 - $4,999,999	0.65%
$5,000,000 - Above	Negotiable

Advisory Services included in Client Fee Schedule:

- Annual Comprehensive Financial Planning
- Annual or semi-annual planning reviews, as agreed upon
- Investment Management and Performance Reporting
- Estate Planning and Wealth Transfer Strategies
- Tax-efficient Lifetime Income Withdrawal Strategies
- Long-Term Care Planning
- College Planning
- Coordination with other professionals such as accountants and attorneys
- Any additional identified planning needs or services as agreed upon

Financial planning fees may be assessed at higher levels dependent on additional work that may be required that is out of the ordinary, eg. business valuation, planning in divorce matters, real estate investment.

Fees shown represent fees paid to the advisor(s)only; other fees and expenses including mutual fund expenses, management fees, annuity costs, etc. may apply.

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