

Serving clients across the country from:



Downers Grove, IL

Boomer, NC

Scottsdale, AZ

Asset Management Fee Schedule

Relationships under \$500,000	1.15%
Relationships between \$500,000 and \$1,000,000*	1.15%
Relationships between \$1,000,000 and \$2,000,000**	0.95%
Relationships between \$2,000,000 and \$5,000,000**	0.75%
Relationships above \$5,000,000**	0.60%

*Financial planning fees are waived for relationships over \$500,000

**Advanced investment tools are available for relationships over \$1,000,000