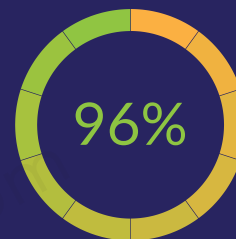


Aspect Capital Limited

TRUST SCORE



Aspect Capital Limited, federally registered in 2003, is a Registered Investment Advisor (RIA) in 1 state(s) with a licensed staff of 40 advisors. Aspect Capital Limited manages \$2 billion and provides investment advisory services for 35 clients (1:1 advisor/client ratio).

Aspect Capital Limited requires a \$0 minimum investment and charges 2.00% for ongoing portfolio management services, depending on the size of the portfolio.

BENEFITS

- Firm uses a transparent fee-only model
- There is one licensed advisor for every 1 clients (industry average 1:50)
- Firm has \$1B or more in assets under management
- Firm has been federally registered for 15 years
- Communications sent to the firm's website are secure and encrypted
- Firm does not have a disciplinary history
- Firm does not have any misdemeanor convictions
- Firm does not have any felony convictions
- Firm does not have an insurance agent conflict
- Firm does not privately manage or own the products they recommend
- Firm does not offer proprietary products

CONSIDERATIONS

- Firm serves fewer than 1,000 clients
- Firm also practices as a law firm or is affiliated with one. When acting in this dual-capacity, advisors may be incentivized to implement plans as an attorney that would drive higher commissions for themselves as investment advisors
- Firm accepts performance-based fees and may be incentivized to take inappropriate risks to beat their performance benchmark
- Firm performs side-by-side management with accounts that have differing fee structures. Investment Advisors may be incentivized to favor clients that pay higher fees over others
- Custodian is unknown

BENEFITS (cont.)

Firm does not receive soft dollar benefits

CONSIDERATIONS (cont.)