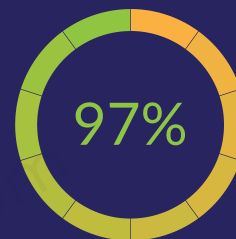


# BerganKDV Wealth Management

TRUST SCORE



BerganKDV Wealth Management, federally registered in 2007, is a Registered Investment Advisor (RIA) in 7 state(s) with a licensed staff of 19 advisors. BerganKDV Wealth Management manages \$1 billion and provides investment advisory services for 835 clients (1:44 advisor/client ratio).

The annualized fee for Investment Supervisory Services is charged as a percentage of Assets under Management, ranging from 1.25% to 0.25%.Â€

## BENEFITS

- Firm uses a transparent fee-only model
- Firm uses a trusted custodian
- There is one licensed advisor for every 44 clients (industry average 1:50)
- Firm has \$1B or more in assets under management
- Firm has been federally registered for 11 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 have an attorney conflict

## CONSIDERATIONS

- Firm serves fewer than 1,000 clients

## BENEFITS (cont.)

Firm does not accept performance-based fees

Firm does not perform side-by-side management

Firm does not privately manage or own the products they recommend

Firm does not offer proprietary products

Firm does not receive soft dollar benefits

## CONSIDERATIONS (cont.)