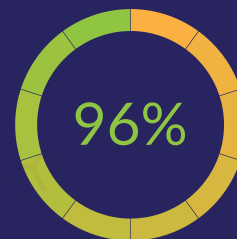


Blue Oak Capital

TRUST SCORE



Blue Oak Capital, federally registered in 2000, is a Registered Investment Advisor (RIA) in 2 state(s) with a licensed staff of 3 advisors. Blue Oak Capital manages \$433.0 million and provides investment advisory services for 145 clients (1:49 advisor/client ratio).

Blue Oak Capital requires a \$2,000,000 minimum investment.

BENEFITS

- Firm does not have any felony convictions
- Firm does not have a disciplinary history
- Firm uses a transparent fee-only model
- Firm has been federally registered for 19 years
- Communications sent to the firm's website are secure and encrypted
- Firm does not have any misdemeanor 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
- Firm does not have an attorney conflict
- Firm does not accept performance-based fees

CONSIDERATIONS

- Firm has less than \$1B in assets under management

BENEFITS (cont.)

Firm does not perform side-by-side management

Firm does not receive soft dollar benefits

Firm provides mobile-friendly experience for their clients

CONSIDERATIONS (cont.)