



B|O|S, federally registered in 1996, is a Registered Investment Advisor (RIA) in 16 state(s) with a licensed staff of 28 advisors. B|O|S manages \$4.3 billion and provides investment advisory services for 857 clients (1:31 advisor/client ratio).

B|O|S requires a \$3,000,000 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 22 years
- Firm has \$1B or more in assets under management
- 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 offer proprietary products
- Firm does not have an attorney conflict
- Firm does not accept performance-based fees

CONSIDERATIONS

Firm privately manages or owns some of the products they recommend and may be incentivized to sell those products over others to their investors

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.)