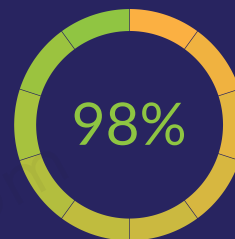


# Breckinridge Capital Advisors

TRUST SCORE



Breckinridge Capital Advisors, federally registered in 1993, is a Registered Investment Advisor (RIA) in 53 state(s) with a licensed staff of 14 advisors. Breckinridge Capital Advisors manages \$33.4 billion and provides investment advisory services for 13,921 clients (1:995 advisor/client ratio).

Fees vary. Please contact advisor.

## 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 25 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 privately manage or own the products they recommend
- Firm does not offer proprietary products
- Firm does not have an attorney conflict

## CONSIDERATIONS

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

## BENEFITS (cont.)

Firm does not accept performance-based fees

Firm does not receive soft dollar benefits

Firm provides mobile-friendly experience for their clients

## CONSIDERATIONS (cont.)