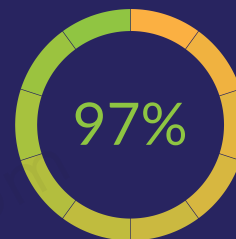


# BSW Wealth Partners

TRUST SCORE



BSW Wealth Partners, federally registered in 1994, is a Registered Investment Advisor (RIA) in 9 state(s) with a licensed staff of 14 advisors. BSW Wealth Partners manages \$951.0 million and provides investment advisory services for 262 clients (1:19 advisor/client ratio).

BSW Wealth Partners requires a \$1,000,000 minimum investment.

## BENEFITS

Firm does not have any felony convictions (Impact:High)

Firm does not have a disciplinary history (Impact:High)

Firm uses a transparent fee-only model (Impact:High)

Firm has been federally registered for 25 years (Impact:High)

Communications sent to the firm's website are secure and encrypted (Impact:Medium)

Firm does not have any misdemeanor convictions (Impact:Medium)

Firm does not have an insurance agent conflict (Impact:Medium)

Firm does not privately manage or own the products they recommend (Impact:Low)

Firm does not offer proprietary products (Impact:Low)

Firm does not have an attorney conflict (Impact:Low)

## CONSIDERATIONS

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

## BENEFITS (cont.)

Firm does not perform side-by-side management (Impact:Low)

Firm does not receive soft dollar benefits (Impact:Low)

Firm provides mobile-friendly experience for their clients (Impact:Low)

## CONSIDERATIONS (cont.)