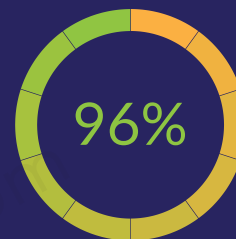


# FiduciaryVest

## TRUST SCORE



FiduciaryVest, federally registered in 2005, is a Registered Investment Advisor (RIA) in 3 state(s) with a licensed staff of 9 advisors. FiduciaryVest manages \$18 billion and provides investment advisory services for 3 clients (1:1 advisor/client ratio).

FiduciaryVest requires a \$5,000,000 minimum investment and charges a blended rate between 1.00% and 0.30% for ongoing portfolio management services, depending on the size of the portfolio.

## BENEFITS

- Firm uses a transparent fee-only model
- Firm uses a trusted custodian
- Firm has \$1B or more in assets under management
- Firm has been federally registered for 13 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
- Firm does not accept performance-based fees

## CONSIDERATIONS

- There is only one licensed advisor for every 1 clients (industry average 1:50)
- Firm serves fewer than 1,000 clients

## BENEFITS (cont.)

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.)