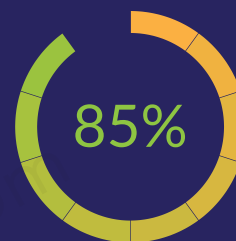


# Guided Choice Asset Management

TRUST SCORE



Guided Choice Asset Management, federally registered in 2002, is a Registered Investment Advisor (RIA) in 1 state(s) with a licensed staff of 5 advisors. Guided Choice Asset Management manages \$16 billion and provides investment advisory services for 155,342 clients (1:31069 advisor/client ratio).

Individuals enrolled in a managed account are normally charged a fee, usually less than 0.45%.

## BENEFITS

- Firm uses a transparent fee-only model
- Firm has \$1B or more in assets under management
- Firm services over 1,000 clients
- 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
- Firm does not perform side-by-side management

## CONSIDERATIONS

- There is only one licensed advisor for every 31069 clients (industry average 1:50)
- Firm has been federally registered for only 16 years
- Custodian is unknown

## BENEFITS (cont.)

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.)