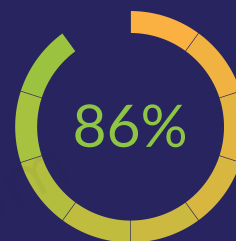


Mason Investment Advisory Services

TRUST SCORE



Mason Investment Advisory Services, federally registered in 1982, is a Registered Investment Advisor (RIA) in 27 state(s) with a licensed staff of 35 advisors. Mason Investment Advisory Services manages \$7 billion and provides investment advisory services for 704 clients (1:21 advisor/client ratio).

Mason Investment Advisory Services requires a \$0 minimum investment and charges a blended rate between 1.00% and 0.35% 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
- There is one licensed advisor for every 21 clients (industry average 1:50)
- Firm has \$1B or more in assets under management
- Firm has been federally registered for 35 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 attorney conflict
- Firm does not accept performance-based fees

CONSIDERATIONS

- Firm serves fewer than 1,000 clients
- Firm is a broker-dealer, or is affiliated with one, and may be subject to compensation-related conflicts of interest
- Firm actively engages in insurance sales and may be incentivized to insure clients with products that generate high sales commissions when lower cost alternatives may exist

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.)