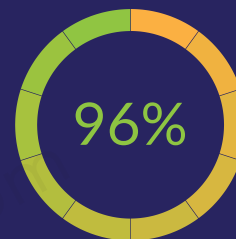


# Northwest Investment Consulting

## TRUST SCORE



Northwest Investment Consulting, federally registered in 1994, is a Registered Investment Advisor (RIA) in 1 state(s) with a licensed staff of 5 advisors. Northwest Investment Consulting manages \$353 million and provides investment advisory services for 19 clients (1:4 advisor/client ratio).

Northwest Investment Consulting requires a \$1,200,000 minimum investment and charges a blended rate between 0.50% and 0.25% for ongoing portfolio management services, depending on the size of the portfolio.

## BENEFITS

- Firm uses a transparent fee-only model
- There is one licensed advisor for every 4 clients (industry average 1:50)
- Firm has been federally registered for 24 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
- Firm does not perform side-by-side management

## CONSIDERATIONS

- Firm has less than \$1B in assets under management
- Firm serves fewer than 1,000 clients
- 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.)