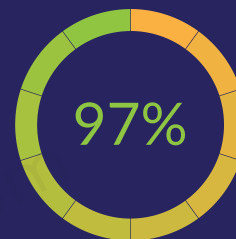


Reilly Financial Advisors

TRUST SCORE



Reilly Financial Advisors, federally registered in 1999, is a Registered Investment Advisor (RIA) in 35 state(s) with a licensed staff of 21 advisors. Reilly Financial Advisors manages \$1.3 billion and provides investment advisory services for 1,013 clients (1:49 advisor/client ratio).

Reilly Financial Advisors requires a \$500,000 minimum investment.

BENEFITS

- Firm does not have any felony convictions
- Firm does not have a disciplinary history
- Firm uses a transparent fee-only model
- Firm has been federally registered for 19 years
- Firm has \$1B or more in assets under management
- Communications sent to the firm's website are secure and encrypted
- Firm does not have any misdemeanor convictions
- Firm does not have an insurance agent conflict
- Firm does not privately manage or own the products they recommend
- Firm does not offer proprietary products
- Firm does not have an attorney conflict

CONSIDERATIONS

- Firm accepts performance-based fees and may be incentivized to take inappropriate risks to beat their performance benchmark
- Firm performs side-by-side management with accounts that have differing fee structures. Investment Advisors may be incentivized to favor clients that pay higher fees over others

BENEFITS (cont.)

Firm does not receive soft dollar benefits

Firm provides mobile-friendly experience for their clients

CONSIDERATIONS (cont.)