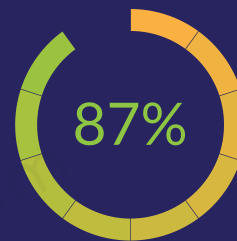


Steele Capital Management

TRUST SCORE



Steele Capital Management, federally registered in 1995, is a Registered Investment Advisor (RIA) in 18 state(s) with a licensed staff of 9 advisors. Steele Capital Management manages \$2 billion and provides investment advisory services for 1,260 clients (1:140 advisor/client ratio).

Steele Capital Management requires a \$0 minimum investment. The annual management fee for ongoing portfolio management services is unlisted (negotiable).

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 22 years
- 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

CONSIDERATIONS

- There is only one licensed advisor for every 140 clients (industry average 1:50)

BENEFITS (cont.)

Firm does not accept performance-based fees

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.)