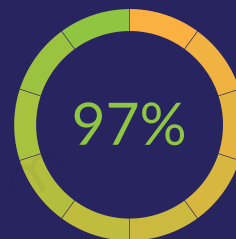


Vintage Financial Services

TRUST SCORE



Vintage Financial Services, federally registered in 1985, is a Registered Investment Advisor (RIA) in 5 state(s) with a licensed staff of 5 advisors. Vintage Financial Services manages \$584.8 million and provides investment advisory services for 482 clients (1:97 advisor/client ratio).

Vintage Financial Services requires a \$500,000 minimum investment.

BENEFITS

Firm does not have any felony convictions (Impact:High)

Firm does not have a disciplinary history (Impact:High)

Firm uses a transparent fee-only model (Impact:High)

Firm has been federally registered for 33 years (Impact:High)

Communications sent to the firm's website are secure and encrypted (Impact:Medium)

Firm does not have any misdemeanor convictions (Impact:Medium)

Firm does not have an insurance agent conflict (Impact:Medium)

Firm does not privately manage or own the products they recommend (Impact:Low)

Firm does not offer proprietary products (Impact:Low)

Firm does not have an attorney conflict (Impact:Low)

CONSIDERATIONS

Firm has less than \$1B in assets under management

BENEFITS (cont.)

Firm does not perform side-by-side management
(Impact:Low)

Firm does not receive soft dollar benefits (Impact:Low)

Firm provides mobile-friendly experience for their
clients (Impact:Low)

CONSIDERATIONS (cont.)