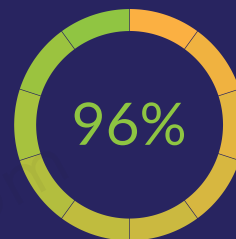


Vision Capital Management

TRUST SCORE



Vision Capital Management, federally registered in 1999, is a Registered Investment Advisor (RIA) in 6 state(s) with a licensed staff of 8 advisors. Vision Capital Management manages \$583.5 million and provides investment advisory services for 796 clients (1:100 advisor/client ratio).

Vision Capital Management requires a \$250,000 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
- 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
- Firm does not accept performance-based fees

CONSIDERATIONS

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

BENEFITS (cont.)

Firm does not perform side-by-side management

Firm does not receive soft dollar benefits

Firm provides mobile-friendly experience for their clients

CONSIDERATIONS (cont.)