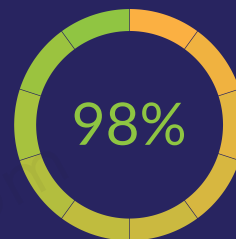


# Warren Averett Asset Management

TRUST SCORE



Warren Averett Asset Management, federally registered in 2001, is a Registered Investment Advisor (RIA) in 9 state(s) with a licensed staff of 25 advisors. Warren Averett Asset Management manages \$2.5 billion and provides investment advisory services for 994 clients (1:40 advisor/client ratio).

Warren Averett Asset Management requires a \$1,000,000 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 17 years  
(Impact:High)

Firm has \$1B or more in assets under management  
(Impact:Medium)

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 offer proprietary products (Impact:Low)

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

## CONSIDERATIONS

Firm privately manages or owns some of the products  
they recommend and may be incentivized to sell those  
products over others to their investors (Impact:Low)

## 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.)