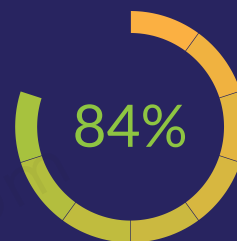


# Wedgewood Partners

## TRUST SCORE



Wedgewood Partners, federally registered in 1988, is a Registered Investment Advisor (RIA) in 53 state(s) with a licensed staff of 5 advisors. Wedgewood Partners manages \$3 billion and provides investment advisory services for 1,386 clients (1:278 advisor/client ratio).

Wedgewood Partners requires a \$1,000,000 minimum investment and charges a blended rate between 1.50% and 0.75% for ongoing portfolio management services, depending on the size of the portfolio.

## BENEFITS

- Firm uses a transparent fee-only model
- Firm has \$1B or more in assets under management
- Firm has been federally registered for 30 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
- Firm does not accept performance-based fees

## CONSIDERATIONS

- There is only one licensed advisor for every 278 clients (industry average 1:50)
- Custodian is unknown

## BENEFITS (cont.)

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.)