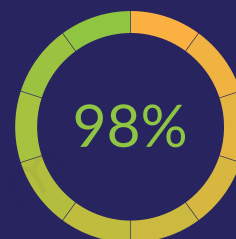


Willow Creek Wealth Management

TRUST SCORE



Willow Creek Wealth Management, federally registered in 1999, is a Registered Investment Advisor (RIA) in 4 state(s) with a licensed staff of 8 advisors. Willow Creek Wealth Management manages \$1.0 billion and provides investment advisory services for 695 clients (1:87 advisor/client ratio).

Willow Creek Wealth 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 19 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 privately manage or own the products they recommend (Impact:Low)

CONSIDERATIONS

BENEFITS (cont.)

Firm does not accept performance-based fees
(Impact:Low)

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.)