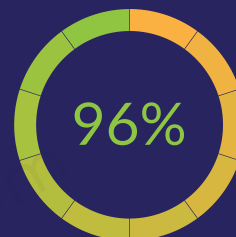


# WrapManager

## TRUST SCORE



WrapManager, federally registered in 2000, is a Registered Investment Advisor (RIA) in 48 state(s) with a licensed staff of 8 advisors. WrapManager manages \$341 million and provides investment advisory services for 294 clients (1:37 advisor/client ratio).

Fees may vary. Please contact an adviser for details.

## BENEFITS

Firm uses a transparent fee-only model

Firm uses a trusted custodian

There is one licensed advisor for every 37 clients (industry average 1:50)

Firm has been federally registered for 18 years

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

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

Firm serves fewer than 1,000 clients

## 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.)