

myFamilyCFO's Investment Management Services Fee* Structure ($\$1,000,000$ Minimum "Household" Account Size)

We know you want to protect and grow your investments, which is why we created the Dynamic Wealth Income Plan to be even better aligned with what is most important to you and your loved ones.

Complimentary: Dynamic Wealth Income Plan: A time segmented approach to better manage portfolio volatility & investor behavior to optimize market opportunities.

Services: Analyze current portfolio volatility, tax efficiency, diversification, fee & performance.

Access to actively managed, institutional, multi-managers with competitive pricing.

Year-round income tax planning to optimize gain/loss harvesting & distribution planning (see reverse side).


Customized income tax transition planning for taxable accounts.

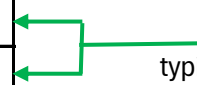
Ongoing monitoring for asset allocation, asset location (taxable, tax deferred, tax free) & style drift.

Guaranteed &/or Lifetime income solutions

Annual income tax summary letter outlining income tax implications for your tax preparer.

Example of $\$3,000,000$ "Household" Account Husband/Wife IRAs & Joint Taxable Account		Investment Strategist		
		A	B	Yours?
Advisor (myFamilyCFO, Inc.)		0.80	0.80	
Custodian & Investment Strategist		0.85	0.45	
Disclosed Mutual Fund/ETF Expense		0.00	0.45	
Undisclosed Mutual Fund/ETF Expense		0.00	0.00	
Total "All In" Fee*	%	1.65%	1.70%	
Annual Fee	\$	\$ 49,500	\$ 51,000	


What you typically see


What you typically DON'T See

Total "All In" Fees* (Minimum "Household" Account Size = $\$1,000,000$)

"Household" Account	Investment Strategist		
	A	B	Yours?
$\$1,000,000 - \$2,000,000$	1.80%	1.90%	
$\$2,000,000 - \$3,000,000$	1.75%	1.80%	
$\$3,000,000 - \$5,000,000$	1.65%	1.70%	
$\$5,000,000 - \$7,000,000$	1.55%	1.65%	
$\$7,000,000 - \$10,000,000$	1.40%	1.45%	
Over $\$10,000,000$	1.15%	1.20%	

*Actual fees may vary depending on many factors such as: mix of stocks, bonds, cash & alternative asset classes; products such as individual securities, mutual funds, exchanged traded funds, etc.; income tax efficiency, active or passive management, single or multi-managers, portfolio turnover, scope of, & case complexity.