

Fee Schedule

For New Clients Only

All prospective clients are offered a complimentary consultation to discuss the range and suitability of Springwater's services. Please contact us at your convenience to do so.

Wealth Management Services

| | |
|-----------------------------|--------|
| First \$1,000,000 | 0.85 % |
| Next \$2,000,000 | 0.70 % |
| Next \$2,000,000 | 0.55 % |
| All assets over \$5,000,000 | 0.40 % |

Wealth management integrates Investment management services and ongoing financial planning advice. Springwater generally assesses new wealth management clients a one-time fee for an initial financial plan, per the Financial Planning Services schedule below.

Financial Planning Services

| | |
|---------------------------|---------------------|
| Initial Financial Plan | \$3,500 to \$10,000 |
| Hourly Financial Planning | \$300 per hour* |

Financial planning fees vary, depending on the nature and scope of work. Clients are provided with a written engagement letter that includes a capped quote for financial planning fees.

* Minimum of \$1,000

Investment Management Services

Springwater generally does not provide investment management services on a stand-alone basis, but may do so at our sole discretion.