

## Brazos Wealth Advisors - Personal Wealth Advisory Services

<u>Typical Qualifying Thresholds for Service Tier</u>	<u>Household Assets / Household Income</u>	\$0 \$0/yr	\$275k \$125k/yr	\$675k \$250k/yr	\$2M \$400k/yr	\$5M \$650k/yr	\$10M \$1M/yr
<u>Available Services...</u>		Starter	Investor	Accumulator	Independent	Affluent	Legacy
<b>Financial Planning</b>							
Comprehensive Financial Plan		✓	✓	✓	✓	✓	✓
Financial Planning Newsletter		✓	✓	✓	✓	✓	✓
Annual Plan Update/Review Meeting		✓	✓	✓	✓	✓	✓
Quarterly Planning Reviews			✓	✓	✓	✓	✓
Professional Coordination (CPA, Attorney, et al)			✓	✓	✓	✓	✓
Financial Plan for Children					✓	✓	✓
Discounted planning fees for Legacy Generations						✓	✓
Ongoing services included for Legacy generation							✓
<b>Investment Management</b>							
Model-Based Portfolios + Annual Rebalancing		✓					
Custom Portfolios + Ongoing Rebalancing			✓	✓	✓	✓	✓
Annual Performance Report		✓	✓	✓	✓	✓	✓
Quarterly Portfolio Reviews			✓	✓	✓	✓	✓
Advanced Stock/Option Strategies Available				✓	✓	✓	✓
Direct Management of Outside Accounts				✓	✓	✓	✓
Private Equity and Venture Capital Placements					✓	✓	✓
Family Asset Aggregation							✓
<b>Concierge Services</b>							
Available for Financial Questions + Consultations		✓	✓	✓	✓	✓	✓
Personal Introductions to BWA Referral Sources		✓	✓	✓	✓	✓	✓
TaxStatus IRS Integration			✓	✓	✓	✓	✓
Tax Management Program				✓	✓	✓	✓
Custody Services (POA/Trustee, Billpay, etc.)				✓	✓	✓	✓
Professional Management (CPA, Attorney, et al)					✓	✓	✓
Real Property Management						✓	✓
<b>Typical Annual Fee</b>		<b>\$1,500 - \$4,000</b>	<b>\$4,000 - \$8,000</b>	<b>\$8,000 - \$15,000</b>	<b>\$15,000 - \$24,000</b>	<b>\$24,000 - \$30,000</b>	<b>\$30,000+</b>