INVESTMENT MANAGEMENT SERVICES

5280 Associates offers a number of options available to you depending on your individual situation. To manage your investments, 5280 Associates charges a percentage of the assets under its care. As your account balance grows, the percentage you pay decreases.

	Thrivent Mutual Funds	Shepherd and Genesis	Advisor	Select	Separately Managed Accounts
Discretionary Asset Management	•	•	•		•
Non-Discretionary Asset Management			•	•	
Asset Management Team	Thrivent Mutual Funds	Vanguard & BlackRock	5280 Associates	Thrivent Investment Management	Institutional Managers
Access to:					
No-load and load-waived mutual funds	•		•	•	•
Exchange-traded funds (ETFs)		•	•		•
Individual stocks and bonds			•		•
Asset Allocation Rebalancing	Automatic	Automatic	With or without Authorization	Automatic	Automatic
Minimum Investment	$2000 or $50/month	Shepherd: $50,000 Genesis: $100,000	$100,000	$100,000	$100,000
Annual Asset Under Management Fees:	Service Fee	Advisory Fee	Advisory Fee	Advisory Fee	Advisory Fee
Less than $50,000	0.85%	N/A	N/A	N/A	N/A
$50,000	0.70%	1.20%	N/A	N/A	N/A
$100,000	N/A	1.00%	1.25%	1.50%	2.20%
$250,000	N/A	0.90%	1.05%	1.30%	2.00%
$500,000	N/A	0.80%	1.00%	1.25%	1.90%
$1,000,000	N/A	0.70%	0.90%	1.10%	1.75%
$3,000,000	N/A	0.60%	0.80%	1.00%	1.65%
$5,000,000	N/A	0.50%	0.75%	0.90%	1.55%
$10,000,000	N/A	0.50%	0.70%	0.80%	1.50%

An independent practice of Thrivent Financial.

Review the product contract or prospectus; or, if you have a brokerage or managed account, see the fee schedule you received when you established the account for specific information about fees and expenses. For detailed information about fees and charges for investment advisory services, review the applicable managed account ADV brochure.

5280 Associates
WEALTH MANAGEMENT

THRIVENT
FINANCIAL®

The financial planning service is an investment advisory service and is designed for you and a Thrivent Financial professional to periodically review your personal financial position holistically and to plan strategies tailored to help you reach your financial goals. Significant changes to your financial situation or objectives may necessitate changes to charges and fees. Please review the Thrivent Financial Planning Service ADV Disclosure Brochure, Service Agreement, and/or the Thrivent Managed Accounts Disclosure Brochure, and/or Thrivent product brochures for a full description of services offered, including fees, commissions, and expenses.

Thrivent Financial Planning Service, solution-based service, and managed account investment services are three distinct services available to investors. Your financial planning fee will vary based on your personal financial situation, your Thrivent Financial representative's practice fee schedule, and other factors including:

- The scope of the service you will receive.
- The complexity of your financial situation and related analysis.
- Your financial professional's and team's time involved working on your financial situation.
- The experience level and credentials of your financial professional.

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