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.

5280 Associates can help you invest. An annual percentage of assets under management fee applies. This covers advice on account selection based on your risk tolerance, establishing the account, ongoing management, and review meetings.		
	Bedrock	**Elevation**
	Foundational Portfolios	Specialty Portfolios*
	Managed allocations of low cost, diversified funds from multiple companies	Money manager portfolios with specialty objectives
Less than $250,000	1.20%	1.55%
$250,000	1.00%	1.35%
$500,000	0.95%	1.25%
$1,000,000	0.85%	1.10%
$3,000,000	0.75%	1.00%
$5,000,000	0.70%	0.85%
$10,000,000	0.65%	0.60%

*Additional manager fee applies
The minimum investment for clients not enrolled in our Financial Planning Program is $250,000 per household.
There is no minimum for Financial Planning clients.

5280 Associates
WEALTH MANAGEMENT

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