

All Davies Wealth Management clients receive:

- Annual fee of 1.50% on assets under management
- Professional investment management
- Bi-Annual financial review
- Regular account statements by mail
- Prompt phone and email support
- Weekly economic and stock market update by email
- Quarterly research papers
- Invitation to select client events

In addition to the above listed items, GOLD clients (\$500,000 to \$3 million) receive:

- Discounted fee of 1.0% on assets under management
- Seasonal *Perspectives* magazine
- Complimentary estate plan review with a qualified attorney
- Discounted tax return preparation
- Invitation to all client events

In addition to the items listed above, PLATINUM clients (\$3 million+) receive:

- Discounted fee of 0.5% on assets under management
- Financial reviews as desired
- Complimentary tax return preparation
- VIP access to select client events