

DASHBOARD WEALTH ADVISORS

PLANNING & INVESTMENT COSTS

0 to \$500,000	1.50%
\$500,000 to \$1 million	1.25%
\$1 million to \$2 million	1.00%
\$2 million to \$5 million	0.75%
\$5 million to \$10 million	0.50%
\$10+ million	0.25%



630-203-3104 | dashwa.com

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In a fee-based account clients pay a quarterly fee, based on the level of assets in the account, for the services of a financial advisor as part of an advisory relationship. In deciding to pay a fee rather than commissions, clients should understand that the fee may be higher than a commission alternative during periods of lower trading. Advisory fees are in addition to the internal expenses charged by mutual funds and other investment company securities. To the extent that clients intend to hold these securities, the internal expenses should be included when evaluating the costs of a fee-based account. Clients should periodically re-evaluate whether the use of an asset-based fee continues to be appropriate in servicing their needs. A list of additional considerations, as well as the fee schedule, is available in the firm's Form ADV Part II as well as the client agreement.