

Transparent, Fee-Only Pricing

We receive no commissions — you pay only for the services we provide, directly and transparently.

	PRIMARY SERVICE		
<p>GET STARTED</p> <p>Discovery Meeting</p> <p>Complimentary</p> <p>No cost · No obligation</p> <ul style="list-style-type: none"> Review your financial documents Clarify goals & risk tolerance Receive initial recommendations No pressure to move forward 	<p>ONGOING MANAGEMENT</p> <p>Portfolio Management</p> <p>Up to 0.50%</p> <p>Annual rate, negotiable · billed quarterly</p> <ul style="list-style-type: none"> Discretionary management Custom Investment Policy Statement \$2,000/yr minimum (<\$400k) Assets held at a qualified custodian 	<p>PLANNING</p> <p>Financial Planning</p> <p>Up to \$300/hr</p> <p>\$5,000 max, initial engagement</p> <ul style="list-style-type: none"> Retirement, tax & estate analysis Written plan & action roadmap Delivered in 30–45 days Reduced/waived for portfolio clients 	<p>AS NEEDED</p> <p>General Consulting</p> <p>Up to \$300/hr</p> <p>No ongoing commitment</p> <ul style="list-style-type: none"> Non-managed investment advice Retirement plan benchmarking Insurance & annuity reviews Divorce planning advice

Portfolio Management Fee Schedule

Illustrative annual fees at the standard 0.50% rate, billed quarterly in arrears based on fair market value

INVESTMENT ASSETS UNDER MANAGEMENT	ANNUAL FEE	EFFECTIVE RATE
\$500,000	\$2,500 (\$625 billed quarterly)	0.50%
\$1,000,000	\$5,000 (\$1,250 billed quarterly)	0.50%
\$2,000,000	\$10,000 (\$2,500 billed quarterly)	0.50%
\$3,000,000	\$15,000 (\$3,750 billed quarterly)	0.50%
\$4,000,000	\$20,000 (\$5,000 billed quarterly)	0.50%
Over \$4,000,000 — negotiated fixed fee		Less than 0.50%

Fee-Only & Fiduciary: RGIM does not receive commissions, referral fees, or compensation from any third party. All fees are fully disclosed in your advisory agreement prior to engagement. As a fiduciary, we are legally obligated to act in your best interest at all times. Your assets are held at a qualified custodian in a separate account in your name. Additional information is available in our Disclosure Brochure (Form ADV Part 2A) at www.rgimllc.com or at www.adviserinfo.sec.gov, CRD #316962.

All fees are negotiable and disclosed in full before services begin.
Fees shown are illustrative; actual fees depend on account size and complexity.

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