FINANCIAL FACT SHEET

Kindred Financial is a boutique investment firm that manages assets for individuals, businesses, trusts and associations, and provides customers with the following:

- Investment Management
- Cash Flow Planning
- Social Security Optimization
- Retirement Planning
- Tax Planning
- Estate Planning

MISSION STATEMENT

To help our clients grow their wealth and make wise financial decisions.

WHAT TO EXPECT

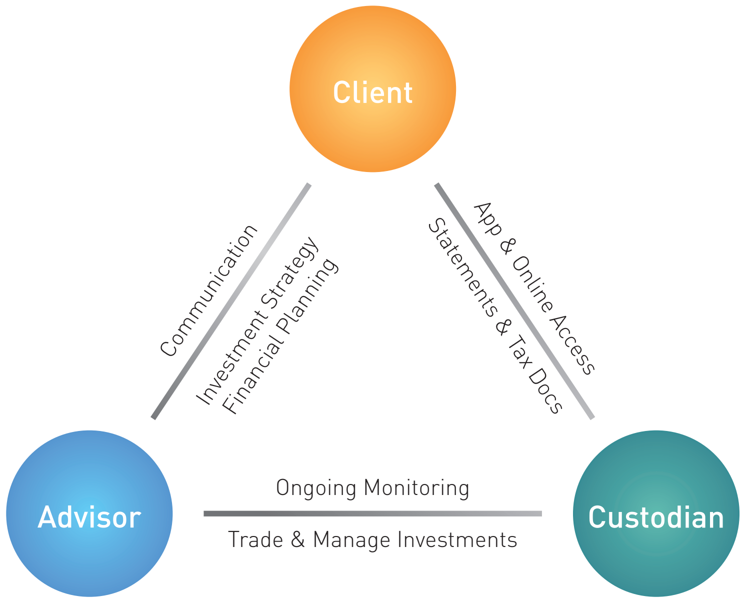
- Quarterly or Annual Meetings
- App and Online Access
- Performance Reporting
- Quick Response to Clients
- Financial Planning Software
- Institutional Money Management

ADVISOR FEE STRUCTURE*

ASSET LEVEL	ADVISOR FEE
$0-$2,000,000	0.95%
$2,000,001-$4,000,000	0.50%
$4,000,001+	0.25%

*Custodial fees & trading fees borne by the investor. Some investment funds carry their own internal expenses. Fees are charged in advance quarterly. If a client terminates service, fees are prorated.

CLIENT ADVISOR RELATIONSHIP



CLIENT FEE EXAMPLE

0.95% ANNUAL ADVISOR FEE

POTENTIAL ADDITIONAL CUSTODIAL FEES:

TRADING

- Commission-free trading for stocks, ETFs
- Commission-free trading for NTF Mutual Funds
- No annual account fee
- $5 per trade for Non-NTF Mutual Fund

TRANSFERS

ACAT Incoming	$0
ACAT Outgoing	$75
ACH in/out	$0
Check fee	$5
Outgoing Wire	$25

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KINDRED FINANCIAL
A Wealth Management Firm