Wintrust® Wealth Management

INVESTMENT ADVISORY FEE SCHEDULE

Below are the fees Wintrust Investments will charge for investment advisory as well as full service financial planning.

Managed Account Fees

Tier	High Fee	Low Fee
$0 - $100,000	2.00%	1.00%
$100,000 - $500,000	1.75%	0.75%
$500,000 - $1,000,000	1.50%	0.50%
$1,000,000 - $5,000,000	1.25%	0.50%
$5,000,000 +	1.00%	0.50%

Financial Planning Fees

Ongoing Financial Planning

- Upfront Fee of $500 - $5,000
- Monthly Fee of $150 - $300

Flat Fee Financial Planning

- Flat fee of $500 - $5,000

Financial Checkup

- Flat rate of $500 - $1,000

All planning fees are dependent on the scope of the planning engagement. The wider the scope of the planning engagement, the higher the planning fee will be.

Please refer to our Wintrust Investments ADV Part 2A for more information about our Investment Advisory and Financial Planning programs, which can be found at www.wintrustwealth.com/disclosures