



Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”), as these sections of the Brochure contain important details about AndersonLane’s advisory services and fees. Fees may be negotiable. The fees below will only apply to you when you request the services listed. Different fees may represent alternative payment options for similar services or combinations of services. Talk with AndersonLane about what services are appropriate for you and the fees that will apply.

Fees Charged by Investment Adviser	Fee Amount		Frequency Fee is Charged	Services
Assets Under Management Fee	\$0-\$2,999,999	0.85%	Quarterly in arrears	Portfolio management and Financial Planning services
	\$3,000,000-\$5,999,999	0.75%		
	\$6,000,000-\$8,999,999	0.65%		
	\$9,000,000-Above	0.55%		
Hourly Fee	\$0		na	na
Subscription Fee	\$0		na	na
Fixed Fee	Varies by engagement. Typically begins at \$6,000/annually for comprehensive planning		Quarterly in arrears	Stand-alone Financial Planning services
Commissions to the Adviser	\$0		na	na
Performance-based Fee	\$0		na	na
Other	\$0		na	na
Fees Charged by Third Parties	Fee Amount		Frequency Fee is Charged	Services
Third Party Money Manager	\$0		na	na
Robo-Adviser Fee	\$0		na	na
Talk with AndersonLane about fees and costs applicable to you				

Additional fees and costs to discuss with your Adviser

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	Charles Schwab
Commissions	No	na
Custodian Fees	Yes	Charles Schwab
Mark-ups	No	na
Mutual Fund/ETF Fees and Expenses	Yes	Fund Management Company