Legacy
INVESTMENT SERVICES, INC.

All Legacy Investment Services clients receive:

-Annual fee of 1% on assets under management
- Professional investment management
- Bi-Annual financial review
- Regular account statements by mail
- Prompt phone and email support
- Weekly economic and stock market update by email
- Quarterly research papers
-Invitation to select client events

In addition to the above listed items, GOLD clients ($750,000 to $3 million) receive:

- Seasonal *Perspectives* magazine
- Complimentary estate plan review with a qualified attorney
- Discounted tax return preparation
- Invitation to all client events

In addition to the items listed above, PLATINUM clients ($3 million+) receive:

- Financial reviews as desired
- Complimentary tax return preparation
- VIP access to select client events

INSERT DISCLOSURES