The Piton Perspective on Fiduciary Responsibility and Transparency

- Piton Wealth, in our holistic engagement with our clients' goals, conceives of our **fiduciary responsibilities** and opportunities in a broad and unique scope. Thus we are proud to note and share all three classes of assets listed here:
  - Assets Under Management (AUM): $475 million. These are total funds that our clients trust us to manage in service to their goals.
  - Assets Under Advisement (AUA): $1.173 billion. For our clients to achieve their life goals, a comprehensive range of assets should be coordinated, so we consider our fiduciary responsibility to all funds under advisement as important a responsibility to our clients as the AUM.
  - Assets Under Distribution (AUD): $33 million. Traditionally AUM and AUA are managed to allow clients the freedom to live the lives they want and to pursue their goals. At Piton Wealth, our process and commitment includes facilitating the goals of our inspiring clients as part of a generous life. We are proud to list our AUD as a representation of the actualization of the aspirations of our clients.
- **Professionalism of Service**: Piton team members bring professional qualification, experience and dedication to every phase of client service. We maintain a current list and details about the credentials of our team members.
- **Transparency**: Piton Wealth is a fee-based practice, so you never have to guess how we get paid. An account is charged at the rate in the chart below that corresponds to the total assets under management in the billing household*.

Assets Under Management	**Annual Rate (%)**
$250,000 to $999,999.99	1.50%
$1,000,000 to $2,499,999.99	1.25%
$2,500,000 to $4,999,999.99	1.00%
$5,000,000 to $9,999,999.99	0.9%
$10,000,000 to $14,999,999.99	0.75%
$15,000,000 and above	0.6%

- The fullest expression of all these commitments to our clients is our Navigated Journey™, so we encourage you next to explore Piton's comprehensive financial planning services in this unique, trademarked service.

*The minimum financial planning fee is $1,500 per year (payable, for example, $125 per month).

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