



	Ameriprise SPS Advisor	Edward Jones Advisory Solutions	Fidelity Personalized Portfolios	Personal Capital Advisory Services	Schwab Managed Portfolios	Wells Fargo Advisors
Minimum Account Size	\$ 75,000	\$ 25,000	\$ 50,000	\$ 200,000	\$ 100,000	\$ 25,000
Investment Focus	Retirement	None	None	None	None	None
Exclusively Use Low Cost Funds	Yes	No	No	No	Yes	No
Commission-Based Compensation	No	Yes	Yes	Yes	No	No
Portfolio Management and Design	World Class Investment Committee	Advisor	Advisor	Outside Asset Manager	World Class Investment Committee	Schwab Asset Management Subsidiary
Advisor Training / Expertise	Best	Better	Good	Call Center	Best	Call Center

Comparison on \$250,000 Portfolio

Advisor Fees	0.50%	2.00%	1.35%	1.50%	0.95%	0.81%	2.00%
Fund Fees	0.20%	0.50%	1.54%	1.00%	0.79%	0.20%	0.79%
Total Fees	0.70%	2.50%	2.89%	2.50%	1.74%	1.01%	2.79%
Total Yearly Fees (\$)	\$ 1,750	\$ 6,250	\$ 7,225	\$ 6,250	\$ 4,350	\$ 2,525	\$ 6,975

Ameriprise

http://www.ameriprise.com/content/files/AMP_402422.PDF

Edward Jones

https://www.edwardjones.com/en_US/products/solutions/fee/index.html

https://www.edwardjones.com/groups/ejw_content/@ejw@us/documents/web_content/web231068.pdf

Fidelity Portfolio Advisory Service

<https://www.fidelity.com/managed-accounts/portfolio-advisory-service/overview>

https://www.fidelity.com/bin-public/060_www_fidelity_com/documents/PDF_Fidelity_Portfolio_Advisory_Services_Brochure.pdf

<https://www.fidelity.com/managed-accounts/services>

https://www.fidelity.com/bin-public/060_www_fidelity_com/documents/customer-service/PAS-fundamentals-and-supplemental.pdf

<http://personal.fidelity.com/products/wealth/pdf/multi-manager-funds.pdf>

Personal Capital

<https://www.personalcapital.com/investing/cut-costs>

<https://www.personalcapital.com/investing/fag>

http://www.adviserinfo.sec.gov/lapd/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=218453

Schwab

http://www.schwab.com/public/schwab/investing/accounts_products/portfolio_solutions/schwab_managed_portfolios/etf_portfolios

http://www.schwab.com/public/schwab/investing/pricing_services/fees_minimums

Wells Fargo Advisors

http://www.adviserinfo.sec.gov/lapd/Content/Common/crd_iapd_Brochure.aspx?BRCHR_VRSN_ID=209473