Evergreen Financial Group LLC

Investment Management Services

Our standard advisory fee for investment management services is based on the value of the client's investment accounts that are managed by the firm:

Investment Management	
Account Value	Advisory Fee
\$0 - \$500,000	1.00%
\$500,001 - \$1,000,000	0.85%
\$1,000,001 - \$3,000,000	0.70%
\$3,000,001 and Above	0.55%