



ADVISORY SERVICES LLC

Small Account Policy:

- \$25,000 minimum for all accounts
- Betterment for all accounts under \$25,000 unless there's an **exception**.

Account types available at Betterment:

- Individual
- Joint
- Trust
- Traditional IRA
- Roth IRA
- SEP IRA

Exception 1: Account types **NOT** available at Betterment

- UTMA's, 401(k)s, 529 plans, selfdirected accounts, custodial or minor accounts, conservatorships and Simple IRAs

Exception 2: Accommodation accounts

- Households with a cumulative accounts balance over \$100,000, we'll accept new accounts of any type on any platform with an account minimum of \$10,000.
- Households with a cumulative accounts balance over \$500,000, we'll accept accounts of any size on any platform.

Note: Before a small account exception can be approved you must provide the names and balances for the qualifying accounts.