

IAG

WEALTH MANAGEMENT

INNOVATIVE ADVISORY GROUP

TABLE OF FEES FOR SERVICES

Version 2021.1

Primary Business Address

394 LOWELL STREET, SUITE 8
LEXINGTON, MA 02420

Website: <http://www.innovativewealth.com>

Last Updated: JANUARY 12, 2021

This brochure provides information about the qualifications and business practices of INNOVATIVE ADVISORY GROUP, LLC. If you have any questions about the contents of this brochure, please contact us at (781) 218-2250 or by electronic mail at legal@innovativewealth.com. Except where indicated, the information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any equivalent state securities authority.

Additional information about INNOVATIVE ADVISORY GROUP, LLC is also available on the United States Securities and Exchange Commission website at <http://www.advisorinfo.sec.gov>. Please do note that INNOVATIVE ADVISORY GROUP, LLC is not responsible for the maintenance or management of this website.

INNOVATIVE ADVISORY GROUP is an Independent Registered Investment Advisor.

- Independent solely and only implies that INNOVATIVE ADVISORY GROUP is not affiliated with any other firm.
- Registered solely and only implies that INNOVATIVE ADVISORY GROUP has registered itself with the appropriate regulatory organization within the United States.
- Investment Advisor solely and only implies that INNOVATIVE ADVISORY GROUP portrays itself to be a firm that provides Investment Advice in accordance with all the disclosures in this brochure.
- Being a registered investment advisor does not imply a certain level of skill or training.

Table of Fee for Services

Innovative Advisory Group, LLC (IAG) provides this simplified Table of Fees for Services and encourages all readers to carefully read Item 4 and Item 5 of the Firm Brochure, as these sections contain important items about the services and fees. All fees are negotiable between IAR, IAG and client, and IAG may apply a discount or waive a fee on a per client basis. The fees below will only apply to a client when such services are requested and provided by IAG and IAR.

| Fees Charged by IAG | Fee Amount | Frequency Fee is Charged | Services |
|-----------------------------|------------------------|---|--|
| Assets Under Management Fee | 1.00% - 2.00% | Quarterly in advance | Portfolio management; Financial/Business Planning |
| Fixed Fees | \$500 - \$20,000 | 50% upon engagement, balance on completion | Financial/Business Planning |
| Hourly Fees | \$150 - \$500 per hour | 50% of estimated hours upon engagement, balance on completion | Portfolio management; Financial/Business Planning |

Additional Fees and Costs to be discussed with IAG and IAR

| Additional Fees/Costs | Chargeable to Client Account Yes/No | Charged Directly By and Paid Directly By Client To |
|-----------------------------------|--|---|
| Brokerage Fees | Yes | TD Ameritrade Institutional Pacific Premier Trust |
| Custodian Fees | Yes | TD Ameritrade Institutional Pacific Premier Trust |
| Mutual Fund/ETF Fees and Expenses | Yes | TD Ameritrade Institutional Pacific Premier Trust |

UPDATE DATE: January 12, 2021