

IAG

WEALTH MANAGEMENT

# INNOVATIVE ADVISORY GROUP

## TABLE OF FEES FOR SERVICES

Version 2023.02

Primary Business Address

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LEXINGTON, MA 02420

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

Last Updated: **SEPTEMBER 14, 2023**

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](mailto: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 charged by IAG 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.

<b>Fees Charged by IAG</b>	<b>Fee Amount</b>	<b>Frequency Fee is Charged</b>	<b>Services</b>
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

<b>Additional Fees/Costs</b>	<b>Chargeable to Client Account Yes/No</b>	<b>Charged Directly By and Paid Directly By Client To</b>
Brokerage Fees	Yes	Charles Schwab & Co., Inc. Pacific Premier Trust CNB Custody
Custodian Fees	Yes	Charles Schwab & Co., Inc. Pacific Premier Trust CNB Custody
Mutual Fund/ETF Fees and Expenses	Yes	Charles Schwab & Co., Inc. Pacific Premier Trust CNB Custody

UPDATE DATE: September 14, 2023