

### Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”), as these sections of the Brochure contain important details about By the Square Investments advisory services and fees. Some fees are negotiable. The fees below will only apply to you when you request the services listed.

Fees are based on the variety of services requested by the client and AUM. Not all the fees below are applicable for every client. When working on the IPS and the client

Fees Charged by Investment Advisor	Fee Amount	Frequency Fee is Charged	Services
\$0 - \$500,000	1.5% AUM	Quarterly	Financial Advice & Continued Portfolio monitoring
\$500,001 - \$1,000,000	1.25% AUM	Quarterly	Financial Advice & Continued Portfolio monitoring
\$1,000,000 & above	1% AUM	Quarterly	Financial Advice & Continued Portfolio monitoring
Hourly Fee	\$350	One Time	Financial Advice & Long-term Financial Planning
Commissions to Advisor	No		
Performance Based Fee	No		
401K Set Up fee	\$1,000	One time	401K Set up
401K Advisory Fees	1% AUM	Quarterly	401K Advisory Fee
Trust - Carob Investments	0.5% AUM	Quarterly	Trust and Financial Planning for Clients Kids
Talk to your Adviser about fees and costs applicable to you			

#### Additional Fees and Costs to Discuss with clients

Additional Fees/Costs	Yes/No	Paid To
Brokerage Fees	Yes	Interactive Brokers
Commissions		
401K – Filling and Paperwork	Y	401Go
Custodial Fees – 401K	Yes	0.1% to Matrix Trust Company
Custodial Fees – Interactive Broker	Yes	Interactive Brokers
Mark-Ups	No	
Mutual Funds/ETF Fees and Expenses	Yes	Mutual Fund Company or ETF
Trust Formation	Y	Yael Magen Esq.
Trust Tax Preparation	Y	By the Square Taxes