

WHO'S PAYING YOUR PLANNER?

Advisory Firm



| Advisory Firm | Abbe Capital | Aberdeen/ Artio | Aberdeen Offshore | Abraham Standard Investments | ABR Funds | Absolute Strategies | ACM Funds | ACR Funds | Adirondack Funds | Advisors Asset Management | Advisors Capital Management | Advisor Excel | AdvisorOne Funds | Advisors Preferred Trust | AEI | AEW | AIA Securities Corp | AIG (Corebridge) | AIMCOR | Alerus Financial LLC | Alger | Alger Offshore | Alkeon | Alliance Bernstein | Allianz | Allspring | AlphaCentric | ALPS Funds | Alps Series Trust | Allstate Life Insurance Company | Altegris Investments | Amana/ Saturn | Ameriprise | | |
|-------------------------------|--------------|-----------------|-------------------|------------------------------|-----------|---------------------|-----------|-----------|------------------|---------------------------|-----------------------------|---------------|------------------|--------------------------|-----|-----|---------------------|------------------|--------|----------------------|-------|----------------|--------|--------------------|---------|-----------|--------------|------------|-------------------|---------------------------------|----------------------|---------------|------------|---|---|
| Allstate Financial Services | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | X | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | |
| Avantax Investment Services | X | | | | | | | | X | | | | | | X | | X | X | | | | | | X | | | | | | | | | | | |
| Cambridge Investment Research | X | | | | | | | | X | X | | | | X | | | | | | | | | X | X | | | | | | X | | | | | |
| Commonwealth Financial | X | | | | | | | | | | | | | X | X | | | | | | | X | X | X | | | | | X | | | | | | |
| CUSO Financial Services | X | | | | | | | | | X | | | | | | | X | | | | | | X | X | | | | | | | | | | | |
| Edward Jones | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | X | | | | | | | | | | | | | | | | | | | | | X | X | X | | | X | | | | | | | | |
| LPL Financial | X | X | | X | X | X | X | X | X | | | X | X | | | | X | X | | X | X | X | X | X | | X | X | X | X | X | | | | X | |
| Merrill Lynch | X | | | | | | | | X | | | | | | | | | | | | | X | X | X | | | | | | | | | | | |
| Morgan Stanley | X | | | | | | | | | | | | | | | | | | | | | X | X | X | | | | | | | | | | | |
| New York Life | X | | | | | | | | | | | | | | | | | | | | | X | X | X | | | | | | | | | | | |
| Northwestern Mutual | X | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | |
| OneAmerica Securities | X | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | |
| PNC Investments | X | | | | | | | | | | | | | | | | | | | | | X | | X | | | | | | | | | | | |
| Primerica | X | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | |
| Raymond James | X | | X | X | | | | | X | | | | | | | | | | | X | X | X | X | X | | X | | | | | | | | | |
| RW Baird | X | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | |
| Wells Fargo | X | X | | X | | | | | | | | | | | | | | | | X | X | | | X | | X | | | | | | | | | X |

WHO'S PAYING YOUR PLANNER?

America First Quantitative Funds
 First Quantitative Funds

Advisory Firm



- Allstate Financial Services
- Ameriprise
- Avantax Investment Services
- Cambridge Investment Research
- Commonwealth Financial
- CUSO Financial Services
- Edward Jones
- J.P. Morgan Chase
- LPL Financial
- Merrill Lynch
- Morgan Stanley
- New York Life
- Northwestern Mutual
- OneAmerica Securities
- PNC Investments
- Primerica
- Raymond James
- RW Baird
- Wells Fargo

| Advisory Firm | American Beacon | American Century | American Equity | American Funds | American General | American National | American Independence Funds | Ameritas | AMG Managers/ Tackman/ Brandywine | AMG Pantheon | Amundi | Anfield Capital Management | Angel Oak Capital Advisors | Apollo | Appleseed | APX Energy | AQR Capital Management | Aquila Group of Funds | Arbitrage Funds | Archer Distributors | Ares Wealth Management | Ariel Investments | Arrow Investments | Aristotle | Artisan Partners | Ascensus | Ash | Assetmark | Ashmore | Ash Brokerage | Ashar Life Settlements | Astor Funds | Athens | |
|-------------------------------|-----------------|------------------|-----------------|----------------|------------------|-------------------|-----------------------------|----------|-----------------------------------|--------------|--------|----------------------------|----------------------------|--------|-----------|------------|------------------------|-----------------------|-----------------|---------------------|------------------------|-------------------|-------------------|-----------|------------------|----------|-----|-----------|---------|---------------|------------------------|-------------|--------|---|
| Allstate Financial Services | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | X | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | |
| Avantax Investment Services | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | X | |
| Cambridge Investment Research | | X | X | X | | | X | | | | | | | | X | | | | | | | | | | | | X | | X | | | | | |
| Commonwealth Financial | | | X | X | | | | X | | X | | | X | | | | | | | X | | | | | | X | | | | | | | X | |
| CUSO Financial Services | | X | X | | X | | | | | | | | X | | | | | | | | | | | | X | X | | | | | | | X | |
| Edward Jones | | | X | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | X | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LPL Financial | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| Merrill Lynch | X | X | X | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | |
| Morgan Stanley | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| New York Life | X | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Northwestern Mutual | X | | X | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | |
| OneAmerica Securities | X | | | | | X | | | | | | | | | | | | | | | | | | | | X | | | | | | | | |
| PNC Investments | X | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | |
| Primerica | X | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | |
| Raymond James | X | X | X | | | | | X | | X | X | X | | | | X | | | | | | X | X | | | | | | | | | | | |
| RW Baird | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Wells Fargo | X | X | X | | | | | X | | X | X | X | X | X | X | | X | | | | X | X | X | X | | | X | | | | | | | |

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Allstate Financial Services

Ameriprise

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Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| | Ave Maria Mutual Funds | Aviva Life & Annuity | AX Investments | Axonix Capital LLC | Baird Investment Management | Bahl & Gaynor | Bank of America | Barings | Baron | Beacon Capital Management | Black Creek Group | Blackrock | Blackstone | Blue Owl | Bluerock Capital | BNY Mellon | Boston Common | Boston Partners Global Investors | BrandywineWalden | Bramshil IncomeGlobal | Brandes Income Performance | Brighthouse | Brinker Capital | Brokers Clearing House | Brookfield | Brookwood | Brown Advisory Funds | Buffalo | Burnham Investors Capital Investment Group | CAIS | Calamos | Cambiar Investors | Calvert | Campbell & Com... | Can... | |
|-------------------------------|------------------------|----------------------|----------------|--------------------|-----------------------------|---------------|-----------------|---------|-------|---------------------------|-------------------|-----------|------------|----------|------------------|------------|---------------|----------------------------------|------------------|-----------------------|----------------------------|-------------|-----------------|------------------------|------------|-----------|----------------------|---------|--|------|---------|-------------------|---------|-------------------|--------|---|
| Allstate Financial Services | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | | | | | | | | | | | X | | | | X | | | | | | | | | | | | | | | | | | | | | |
| Avantax Investment Services | | | | | | | | | | X | X | X | | | | | | | | | X | | | | | | | | | | | | | | | X |
| Cambridge Investment Research | | | | | X | | | | | X | X | X | X | X | | | | | | | X | | X | | | | | | | | | | | | | |
| Commonwealth Financial | | | | | | | | | | | X | X | X | | | | | X | | | X | | | | X | | | | | | | | | X | | |
| CUSO Financial Services | | | | | | | | | X | | X | | | | | | | | | | X | | | | | | | | | | | | | | | |
| Edward Jones | | | | | | | | | | | X | | | | | | | | | | X | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | | | | | | | | | | | X | | | | X | | | X | | | X | | | | | | | | | | | | | X | | |
| LPL Financial | X | X | X | X | | | | X | | | X | | | | X | | | | X | | X | X | | | | | | | X | | | | | | X | |
| Merrill Lynch | | | | | | | | | | | X | | | | X | | | | | | X | | | | | | | | | | | | | | | |
| Morgan Stanley | | | | | | | | | | | X | | | | X | | | | | | X | | | | | | | | | | | | | | | |
| New York Life | | | | | | | | | X | | X | | | | X | | | | | | X | | | | | | | | | | | | | X | | |
| Northwestern Mutual | | | | | | | | | X | | X | | | | X | | | | | | X | | | | | | | | | | | | | | | |
| OneAmerica Securities | | | | | | | | | X | | X | X | | | X | | X | | | | X | | | | | | | | | | | | X | | | |
| PNC Investments | | | | | | | | | X | | X | | | | X | | X | | | | X | | | | | | | | | | | | | | | |
| Primerica | | | | | | | | | | | X | | | | X | | | | | | X | | | | | | | | | | | | | | | |
| Raymond James | X | | | | X | | | X | | | X | X | | | X | | | | | | X | | | | | | | | | | | | | | X | |
| RW Baird | | | | | | X | | | | X | X | | | | X | | | | | | X | | | | | | | | | X | | | | | | |
| Wells Fargo | | | | | | | | | | | X | | | | X | X | X | X | X | | X | | | X | | X | X | X | X | X | X | X | X | X | X | X |

WHO'S PAYING YOUR PLANNER?

Company
Fitzgerald

Advisory Firm



Allstate Financial Services

Ameriprise

Avantax Investment Services

Cambridge Investment Research

Commonwealth Financial

CUSO Financial Services

Edward Jones

J.P. Morgan Chase

LPL Financial

Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| | Capital Square | Carlyle/Alpvest | Carlyle Group of Voya | Carrillon/ Eagle/ Scout/ Chartwell | Catalyst Funds | Causeway Capital | Cavalier | Cavanah Hill Funds | CBOE Vest | Cedar Ridge Funds | Centerstone Investors Group | Central Park Group | Champlain Investment Partners | Charles Schwab | Chase Investment Counsel | Chiron Group | CIM Group | CION Securities LLC | City National Rochdale | Clarion Partners | ClearBridge | CliffWater | CM Advisors | CNL Group | CNL Securities | Columbia | Cognios Funds | Cohen & Steers | Commonwealth Fund Services | Community Capital Management | Conestoga | Congress Funds | Convergence Funds | Conversus | |
|-------------------------------|----------------|-----------------|-----------------------|------------------------------------|----------------|------------------|----------|--------------------|-----------|-------------------|-----------------------------|--------------------|-------------------------------|----------------|--------------------------|--------------|-----------|---------------------|------------------------|------------------|-------------|------------|-------------|-----------|----------------|----------|---------------|----------------|----------------------------|------------------------------|-----------|----------------|-------------------|-----------|---|
| Allstate Financial Services | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Avantax Investment Services | X | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | | |
| Cambridge Investment Research | | | | | | | | | | | | X | | | | X | X | | | | | | X | | | | | | | | | | X | | |
| Commonwealth Financial | | X | | | | | | | | X | | | | | | | | X | X | X | | | | | X | | | | | | | | | | |
| CUSO Financial Services | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | |
| Edward Jones | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | |
| LPL Financial | | X | X | X | | X | X | X | X | X | X | X | X | X | | X | | | | | | | X | X | X | X | X | X | X | X | X | X | X | | |
| Merrill Lynch | | | | | | | | | | | | | | | | | | | | | | | | X | | X | | | | | | | | | |
| Morgan Stanley | | | | | | | | | | | | | | | | | | | | | | | | X | | X | | | | | | | | | |
| New York Life | | | | | | | | | | | | | | | | | | | | | | | | X | | X | | | | | | | | | |
| Northwestern Mutual | | | X | | | | | | | | | | | | | | | | | | | | | X | | X | | | | | | | | | |
| OneAmerica Securities | | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | |
| PNC Investments | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | X |
| Primerica | | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | |
| Raymond James | | | | | | | | | | | | | X | | | | | | | | | | | X | | X | | | | | | | | | |
| RW Baird | | | | | | | | | | | | | X | | | | | | | | | | | X | | X | | | | | | | | | |
| Wells Fargo | | | X | X | X | | | | | | | | X | | | | | | | | | X | | X | | X | X | | | X | X | | | | |

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Ameriprise

Avantax Investment Services

Cambridge Investment Research

Commonwealth Financial

CUSO Financial Services

Edward Jones

J.P. Morgan Chase

LPL Financial

Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| | Eagle Asset Management | Eagle Life | Easterly Funds | Eaton Vance | Edgewood Management | EJF Capital | Emerald | Empiric | Empower | Investnet | EQIS | Equinox Funds | Equitable (AXA) | Equitable Financial Life Insurance | Equity Investment Group | Eventide | Evermore Funds Trust | Exchange Right | F&G | Federated Hermes | Federated Securities Corp. | Fidelity | Fidelity & Guaranty Life | Fiera Capital Series Trust | Financial Independent Group | First Eagle | First Investors | First Pacific Advisors | First Trust | Firsthand Funds | Fixed Income Securities | FMI | FMT Solutions | Forethought | Forward Funds | FP4 F | |
|-------------------------------|------------------------|------------|----------------|-------------|---------------------|-------------|---------|---------|---------|-----------|------|---------------|-----------------|------------------------------------|-------------------------|----------|----------------------|----------------|-----|------------------|----------------------------|----------|--------------------------|----------------------------|-----------------------------|-------------|-----------------|------------------------|-------------|-----------------|-------------------------|-----|---------------|-------------|---------------|-------|--|
| Allstate Financial Services | | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | | | | | | | | | | | | | | X | | | | | X | X | | | X | | | | | | | | | | | | | | |
| Avantax Investment Services | X | | | | | | | | | | | X | | | | | | | | X | | | | | | | | X | | | | | | | | | |
| Cambridge Investment Research | X | | | | | | | | X | X | | X | | | | X | | | | X | X | | X | | | | | X | | | X | | X | X | X | | |
| Commonwealth Financial | | | X | | | | | | | | | X | | | | | | | X | X | | | | X | | | | | | | | | | | | | |
| CUSO Financial Services | X | | | | | | | | X | X | | X | | | | | X | X | | | | | | X | | | | X | | | | | | | | | |
| Edward Jones | | | X | | | | | | | | | | | | | | | | | X | X | | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | | | X | | | | | | | | | | | | | | | | X | X | | | | | | | | | | | | | | | | | |
| LPL Financial | X | X | X | | X | X | X | X | | | | X | X | | X | | | | | | | | X | | X | X | X | X | X | | | | | | X | X | |
| Merrill Lynch | | | X | | | | | | | | | | | | | | | | | X | X | | | X | | | | | | | | | | | | | |
| Morgan Stanley | | | X | | | | | | | | | | | | | | | | X | X | | | X | | | | | | | | | | | | | | |
| New York Life | | | X | | | | | | | | | | | | | | | | X | X | | | X | | | | | | | | | | | | | | |
| Northwestern Mutual | | | X | | | | | | | | | | | | | | | | X | X | | | X | | | | | | | | | | | | | | |
| OneAmerica Securities | | | | | | | | X | | | | X | | | | | | | | X | X | | | | | | | | | | | | | | | | |
| PNC Investments | X | | X | X | | | | | | | | | X | | | | | | | X | X | | | | | | | | | | | | | | | | |
| Primerica | | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | |
| Raymond James | | | X | | | | | | | | | | | X | | | | | X | X | | | X | | | | | X | | | | | | | | | |
| RW Baird | | | X | | | | | | | | | | | | | | | | | X | X | | | | | X | X | X | | | | | | | | | |
| Wells Fargo | | X | | X | | | | | | | | | | X | X | | | | | X | X | | | X | | | | X | | | | | | | | | |

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New York Life

Northwestern Mutual

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Primerica

Raymond James

RW Baird

Wells Fargo

| | Frank Funds | Franklin Templeton | Frost Funds | Fred Alger Funds | FS Investments | Fuller & Thayer | Fund X Upgrader Fund | FundVantage Trust | Gateway | Gleaner Life | Global Atlantic | Goldman Sachs | Good Harbor Financial | Goodnow | Gotham Asset Management | Graham | Great American | Greenbacker | Green Century | Griffin Capital | Guardian Investor Services | Guggenheim | GQG | Hamlin Capital Management | Harbor Funds | HarbourVest | Harding Loevner Funds | Hartford | Heartland Funds | Hennessey Funds | Highland | Hillman | Hines Securities | Hood River | Horis- | | |
|-------------------------------|-------------|--------------------|-------------|------------------|----------------|-----------------|----------------------|-------------------|---------|--------------|-----------------|---------------|-----------------------|---------|-------------------------|--------|----------------|-------------|---------------|-----------------|----------------------------|------------|-----|---------------------------|--------------|-------------|-----------------------|----------|-----------------|-----------------|----------|---------|------------------|------------|--------|---|--|
| Allstate Financial Services | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | X | | | | | | | | | | X | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| Avantax Investment Services | X | | | X | | | | | | X | | | | | | | | | | | | | | | | X | | | | | | | X | | | | |
| Cambridge Investment Research | | | | X | | | | | X | | X | | | | | X | X | | | | | | | | X | | | | | | | | | X | | | |
| Commonwealth Financial | X | | | | | | | | X | X | X | | X | | X | | | | | | | | | | X | | | | | | | | X | | | | |
| CUSO Financial Services | X | | | | | | | | | X | X | | | | | | | | X | | | | | | | X | | | | | | | X | | | X | |
| Edward Jones | X | | | | | | | | | | X | | | | | | | | | | | | | | | X | | | | | | | | | | X | |
| J.P. Morgan Chase | X | | | | | | | | | | X | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| LPL Financial | X | X | X | X | X | X | X | X | | X | X | | | | X | | | | | X | X | | | X | | X | | | | X | | | | X | X | | |
| Merrill Lynch | X | | | | | | | | | | X | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| Morgan Stanley | X | | | | | | | X | | | X | | | | | | | | | X | | | | | | X | | | | | | | | | | | |
| New York Life | X | | | | | | | | | | X | | | | | | | | | | X | | | | | X | | | | | | | | | | | |
| Northwestern Mutual | X | | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| OneAmerica Securities | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PNC Investments | X | | | | | | | | | X | X | | | X | | | | | | | | X | | X | | | | | | | | | | | | | |
| Primerica | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Raymond James | X | | | X | | | | | | X | X | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| RW Baird | X | | | | | | | | | | X | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| Wells Fargo | | | | X | | | | X | | | X | X | | | | | | X | | | X | X | | X | | X | X | X | X | X | X | X | X | X | X | X | |

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Wells Fargo

| | Hotchkis and Wiley Capital Management | Howard Capital Management | iCapital | IMPACT | InCapital | Impax Asset Management | Inland Securities | Infinity Capital Partners | InfoArmor | Inland Securities Corporation | InspereX | Integrated Capital Management | Integrated Capital Partners | Integrity Life | Integrity Vikings Fund Services | Invesco | Ironclad Funds | iShares | Ivy | Jackson National | Jackson Square | James Advantage | Janus Henderson | Jensen Quality Growth Fund | JOHCM | John Hancock | Johnson Mutual Funds | Jones Lang LaSalle | J.P. Morgan | Kayne Anderson Kinetic Funds | K2 | Keeley | Kensington | Keystone | Kinetics Funds | KKM F | | | |
|-------------------------------|---------------------------------------|---------------------------|----------|--------|-----------|------------------------|-------------------|---------------------------|-----------|-------------------------------|----------|-------------------------------|-----------------------------|----------------|---------------------------------|---------|----------------|---------|-----|------------------|----------------|-----------------|-----------------|----------------------------|-------|--------------|----------------------|--------------------|-------------|------------------------------|----|--------|------------|----------|----------------|-------|---|--|--|
| Allstate Financial Services | | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | |
| Ameriprise | | | | | | | | | | | | | | | X | | | | | | | X | | | X | | | | | | | | | | | | | | |
| Avantax Investment Services | | | | | | X | | | | | | | | | X | | | | | X | | | | | X | | X | | | | | | | | | | | | |
| Cambridge Investment Research | | | X | X | | | X | | X | | | X | X | | | | | | | X | | | | | | | | X | | | | | | X | X | | | | |
| Commonwealth Financial | | | X | | | X | | | | | | | | | X | | X | | | X | | | | | X | | | X | | | | | | | | | | | |
| CUSO Financial Services | X | X | | | | X | | | | | X | | | | X | | | | | X | | | | | | | | | | | | | | | | | | | |
| Edward Jones | | | | | | | | | | | | | | | X | | | | | X | | | | | X | | | X | | | | | | | | | | | |
| J.P. Morgan Chase | | | | | | | | | | | | | | | X | X | X | | | X | | X | X | X | X | X | | X | X | | | | | | | | | | |
| LPL Financial | | | | | | | | | | | | | X | X | X | | | X | X | | X | X | X | X | X | X | | X | X | | | | | | | X | X | | |
| Merrill Lynch | | | | | | | | | | | | | | | X | | | | | | | X | | | | | | X | | | | | | | | | | | |
| Morgan Stanley | | | | | | | | | | | | | | | X | | | | | | | X | | | | | | X | | | | | | | | | | | |
| New York Life | | | | | | | | | | | | | | | X | | | | | | | X | | | | | | X | | | | | | | | | | | |
| Northwestern Mutual | | | | | | | | | | | | | | | X | | | | | | | X | | | | | | X | | | | | | | | | | | |
| OneAmerica Securities | | | | | | | | | | | | | | | X | | | | | | | X | | | | | | X | | | | | | | | | | | |
| PNC Investments | X | | | | | X | | | | X | | | | | X | | | | X | | | | | | | | | X | | | | | | | | | | | |
| Primerica | | | | | | | | | | | | | | | X | | | | | | | | | | | | | X | | | | | | | | | | | |
| Raymond James | | | | | | | | | | | | | | | X | | | | | | | X | | | | | | X | | | | | | | | | | | |
| RW Baird | | | | | X | | | | X | | | | | | X | | | | | | | | | | | | X | | X | | | | | | | | | | |
| Wells Fargo | X | | | | | | | | | | | | | | X | | | | | | X | | | | X | X | | X | | | | | | | | | X | | |

WHO'S PAYING YOUR PLANNER?

Advisory Firm



Allstate Financial Services

Ameriprise

Avantax Investment Services

Cambridge Investment Research

Commonwealth Financial

CUSO Financial Services

Edward Jones

J.P. Morgan Chase

LPL Financial

Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| | Kopernik Funds | LaSalle Investment Management | Lateef Fund | Lazard Asset Management | Leader Funds | Lee Munder Capital Group | Legg Mason | Leuthold Funds | Liberty Life Assurance Company of Boston | Liberty One Investment Management | Liberty Street Advisors | Lincoln | Lisanti Funds | Litman Gregory Fund Advisors | Lockwood Advisors | LoCorr | Loomis | Lord Abbett | LSV Asset Management | Lyrical Asset Management | Macquarie | Madison Asset Management | Mai Funds | Maingate MLP Funds | Mainstay | Manning & Napier | Marketfield Funds | Mass Mutual | Masters Funds | Matthew Asia Funds | Matthews International Fund | MCI | MDS | M.D. Sass Funds | Meeder Funds | MFMR | |
|-------------------------------|----------------|-------------------------------|-------------|-------------------------|--------------|--------------------------|------------|----------------|--|-----------------------------------|-------------------------|---------|---------------|------------------------------|-------------------|--------|--------|-------------|----------------------|--------------------------|-----------|--------------------------|-----------|--------------------|----------|------------------|-------------------|-------------|---------------|--------------------|-----------------------------|-----|-----|-----------------|--------------|------|--|
| Allstate Financial Services | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | | | | | | | | | | | | | | | | | X | | | | | | | X | | | | | | | | | | | | | |
| Avantax Investment Services | | | | | | | | | | X | | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| Cambridge Investment Research | | X | | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | X | | | | | |
| Commonwealth Financial | | X | | | | | | | | | | | | | X | X | X | | | | | | | X | | | X | | | | | | | | | | |
| CUSO Financial Services | | | | | | | | X | | X | | | | | | | X | | X | | | | | | | X | | | | | X | | | | | | |
| Edward Jones | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | | | | | | X | | | | | | | | | | | | | | X | | | | X | | | | | | | | | | | | | |
| LPL Financial | X | X | X | X | X | X | X | X | X | X | X | | | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | |
| Merrill Lynch | | | | | | | | | | | | | | | | | X | | | X | | | | X | | | | | | | | | | | | | |
| Morgan Stanley | | | | | | X | | | | | | | | | | | X | | | X | | | | X | | | | | | | | | | | | | |
| New York Life | | | | | | X | | | | | | | | | | | | | | X | | | | X | | | | | | | | | | | | | |
| Northwestern Mutual | | | | | | X | | | | | | | | | | | | | | X | | | | X | | | | | | | | | | | | | |
| OneAmerica Securities | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | X | |
| PNC Investments | | | X | | | X | | | | X | | | X | | | | X | | | | X | | | | | | X | | | | | | | | | | |
| Primerica | | | | | | X | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Raymond James | | | | | | | | | | | | | | | | | X | | | X | | | | X | | | | | | | | | | | | | |
| RW Baird | | | | | | X | | | | X | | | | | | | X | | | | | | | | | | | | | | | | | | | | |
| Wells Fargo | | | X | | | | | | | | | | | | X | | X | | | | | | X | X | X | X | X | X | X | X | X | X | X | X | X | X | |

WHO'S PAYING YOUR PLANNER?

MEMBERS Life
Advisory Firm



Allstate Financial Services

Ameriprise

Avantax Investment Services

Cambridge Investment Research

Commonwealth Financial

CUSO Financial Services

Edward Jones

J.P. Morgan Chase

LPL Financial

Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| | Meridian | Merger Fund | Merz | MetLife | Metropolitan Life Insurance Services | Metropolitan West Funds | Mewbourne | MFS | Midas Funds | Midland | Miller Howard | Miller Value | Minnesota Life Insurance Co. | Mirae Asset Discovery Co. | Mirae Asset Discovery Funds | Mirova | Mondrian | Morgan Stanley | Morningstar Investment Services | Motley Fool Funds | Mutual of Omaha | Nassau RE | National Western | Nationwide | Natixis | Navigator Funds | Needham | Nelson Financial Group (NFG) | Neuberger Berman | Newfound Research | New York Life | Next Play Capital | Nichlas Group | North American | Northeast Invest. | Nor+ | | | |
|-------------------------------|----------|-------------|------|---------|--------------------------------------|-------------------------|-----------|-----|-------------|---------|---------------|--------------|------------------------------|---------------------------|-----------------------------|--------|----------|----------------|---------------------------------|-------------------|-----------------|-----------|------------------|------------|---------|-----------------|---------|------------------------------|------------------|-------------------|---------------|-------------------|---------------|----------------|-------------------|------|---|---|--|
| Allstate Financial Services | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | | | | | | | X | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | |
| Avantax Investment Services | | | | | X | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Cambridge Investment Research | | X | | | X | | | | X | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | |
| Commonwealth Financial | | | | | X | X | | | | | | | | | X | | X | | | | | | X | X | | | | | | | | | | | | | | | |
| CUSO Financial Services | | | | | | X | | | X | | | | | | | | | X | | | | | X | | | | | | | | | | | | | | | | |
| Edward Jones | | | | | | X | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | | | | | | X | | | | | | | | | | | X | | | | | | | X | | | | | | | | | | | | | | | |
| LPL Financial | X | X | | X | X | | X | | X | X | | X | X | X | | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | |
| Merrill Lynch | | | | | | X | | | | | | | | | | | X | | | | | | X | X | | | | | | | | | | | | | | | |
| Morgan Stanley | | | | | | X | | | | | | | | | | | X | | | | | | | X | | | | | | | | | | | | | | | |
| New York Life | | | | | | X | | | | | | | | | | | X | | | | | | | X | X | | | | | | | | | | | | | | |
| Northwestern Mutual | | | | | | X | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | |
| OneAmerica Securities | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | |
| PNC Investments | | | | | | X | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | |
| Primerica | | | | | | | | | | | | | | | | | | | | | | | | X | X | | | | | | | | | | | | | | |
| Raymond James | | | | | | X | | | | | | | | | | | | | | | | | | X | X | | | | | | | | | | | | | | |
| RW Baird | | | | | | X | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | |
| Wells Fargo | X | | | | | X | X | | | | X | | | | | X | X | | | | | | X | | | | | X | | | | | | | | | | | |

Data as of 8/7/2024

WHO'S PAYING YOUR PLANNER?

Northern Lights Fund
NorthPointe Funds
North Square
Nuveen
Oak Associates Funds
Oakmark
Oak Ridge Funds
Ohio National
Olstein
OneAmerica
Oppenheimer
Orinda Asset Management
Orion Portfolio Management
Osterweis Funds
Owl Rock
Pacific Heights Asset Management
Pacific Income Advisors
Pacific Life
Pacific Oak
Parametric
Parnassus Investments
Partners Group
Passico
Patient Capital Management
Performance Trust
Pershing
PGIM
PIMCO
Pinnacle Group
Pioneer
Polen Capital Management
Poplar Forest Capital
Power Income Principal
Praxis
Preferred Capital

Advisory Firm



Allstate Financial Services

Ameriprise

Avantax Investment Services

Cambridge Investment Research

Commonwealth Financial

CUSO Financial Services

Edward Jones

J.P. Morgan Chase

LPL Financial

Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| Advisory Firm | Northern Lights Fund | NorthPointe Funds | North Square | Nuveen | Oak Associates Funds | Oakmark | Oak Ridge Funds | Ohio National | Olstein | OneAmerica | Oppenheimer | Orinda Asset Management | Orion Portfolio Management | Osterweis Funds | Owl Rock | Pacific Heights Asset Management | Pacific Income Advisors | Pacific Life | Pacific Oak | Parametric | Parnassus Investments | Partners Group | Passico | Patient Capital Management | Performance Trust | Pershing | PGIM | PIMCO | Pinnacle Group | Pioneer | Polen Capital Management | Poplar Forest Capital | Power Income Principal | Praxis | Preferred Capital | |
|-------------------------------|----------------------|-------------------|--------------|--------|----------------------|---------|-----------------|---------------|---------|------------|-------------|-------------------------|----------------------------|-----------------|----------|----------------------------------|-------------------------|--------------|-------------|------------|-----------------------|----------------|---------|----------------------------|-------------------|----------|------|-------|----------------|---------|--------------------------|-----------------------|------------------------|--------|-------------------|---|
| Allstate Financial Services | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | | | X | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| Avantax Investment Services | | | | | | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | |
| Cambridge Investment Research | | | | | | | X | | X | | | X | | X | | | X | X | | | | X | | | X | | X | | | | | | | X | X | |
| Commonwealth Financial | | | X | | | | | | | | | | | | | | | X | | | X | | | | | X | X | | X | | | | | | | |
| CUSO Financial Services | | | X | | | | | | X | | | X | | | | | | | | | X | | | | | X | X | | | | | | | | | |
| Edward Jones | | | X | | | | | | | | | | | | | | | | | | | | | | X | X | | | | | | | | | | |
| J.P. Morgan Chase | | | X | | | | | | | | | | | | | | | | | | | | | | X | X | | | | | | | | | | |
| LPL Financial | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| Merrill Lynch | | | X | | | | | | | | | | | | | | | | | | | | | | X | X | | | | | | | | | | |
| Morgan Stanley | | | X | | | | | | | X | | | | | | | | | | | | | | | | X | X | | X | | | | | | | |
| New York Life | | | X | | | | | | | | | | | | | | | | | | | | | | X | X | | X | | | | | | | | |
| Northwestern Mutual | | | X | | X | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | |
| OneAmerica Securities | | | | | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | |
| PNC Investments | | | | | | | | | | | | | | | | | X | | | | | | | | X | X | | | | X | X | | | | | |
| Primerica | | | X | | | | | | | | | | | | | | | | | | | | | | | X | X | | | | | | | | | |
| Raymond James | | | X | | | | | | | | | | | | | | | | | | | | | | X | X | | | | | | | | | | |
| RW Baird | | | | | | | | | | X | | | | | | | X | | | X | | | | | | X | | | | | | | | | | |
| Wells Fargo | | X | X | | | | | X | | | | | | | | X | | | | X | | | | X | X | | | | X | | | | | X | | |

WHO'S PAYING YOUR PLANNER?

Union Investment Trust

Advisory Firm



Allstate Financial Services

Ameriprise

Avantax Investment Services

Cambridge Investment Research

Commonwealth Financial

CUSO Financial Services

Edward Jones

J.P. Morgan Chase

LPL Financial

Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| | Sterling Capital Funds | State Street Global Advisors | Steben & Company | StepStone | Sterling Capital Funds | SunAmerica Fund | Swan | Symetra | Tactical Fund Advisors | Talcott Resolution | Tanaka | TCW Funds | The Advisors Inner Circle Fund | The Commerce Funds | The CORE Group | The Marisco Group | The Pacific Financial Group | The PLUS Group | The Standard | Third Avenue Trust | Thompson Investment Management | Thornburg | TIAA Cref | TNBC | Thrivent Investment Management | Timothy Partners | Tocqueville Funds | Toews Asset Management | Torrey Funds | Toroso Investments | Tortoise Capital Advisors | Total Fund Solutions | Touchstone | Transamerica | Tributary | T. Rowe | | | |
|-------------------------------|------------------------|------------------------------|------------------|-----------|------------------------|-----------------|------|---------|------------------------|--------------------|--------|-----------|--------------------------------|--------------------|----------------|-------------------|-----------------------------|----------------|--------------|--------------------|--------------------------------|-----------|-----------|------|--------------------------------|------------------|-------------------|------------------------|--------------|--------------------|---------------------------|----------------------|------------|--------------|-----------|---------|---|---|---|
| Allstate Financial Services | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ameriprise | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Avantax Investment Services | | | | | | | | | | | | | | X | | X | | | | | | | | | | | | | | | | | | | | | | | |
| Cambridge Investment Research | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Commonwealth Financial | | | X | X | | | | X | | | | | | | | | | X | | | | X | X | | | | | | | | | | | | | | X | | |
| CUSO Financial Services | X | | | | | | X | | | | | | | | | X | | | | | | | | X | | | | | | | | | | | | | | | |
| Edward Jones | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| LPL Financial | X | X | | | X | X | X | X | X | | X | X | | | X | | | X | X | X | X | X | X | X | | X | X | | | | X | X | | | | X | | | |
| Merrill Lynch | | | | | | | | | | | | | | | | | | | | | | X | X | | | | | | | | | | | | | | | | |
| Morgan Stanley | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | | |
| New York Life | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Northwestern Mutual | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | X | |
| OneAmerica Securities | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PNC Investments | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Primerica | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Raymond James | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | X | |
| RW Baird | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | X |
| Wells Fargo | X | | | X | | X | | | | X | X | | | | | | | | | | X | X | | | | | X | X | | X | X | X | X | X | X | X | X | X | |

WHO'S PAYING YOUR PLANNER?

How We Price

Advisory Firm



Allstate Financial Services

Ameriprise

Avantax Investment Services

Cambridge Investment Research

Commonwealth Financial

CUSO Financial Services

Edward Jones

J.P. Morgan Chase

LPL Financial

Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| | TruChoice | TruStage | UBS Global Asset Management | UB&T | United Life | US Energy | US Bancorp Fund Services | US Life | Van Ek Global | Vanguard | Vaughan Nelson | Victory | Victory Capital | Victory Funds/ Munder/ RS/ Compass/ EMP/ U. | Virtus | Vivaldi Asset Management | Voya | Voya Pomona | Voya Select Advantage | VP Distributors | Wasatch Advisors | Wasmer Advisors | Water Island Capital | Waveland Capital | WCM | W.E. Donoghue | Weiss Multi Strategy Advisers | Weitz Funds | Wells Fargo | Western & Southern | Western Asset | Western National | Westwood | William Blair | Wilmington | Wit. |
|-------------------------------|-----------|----------|-----------------------------|------|-------------|-----------|--------------------------|---------|---------------|----------|----------------|---------|-----------------|---|--------|--------------------------|------|-------------|-----------------------|-----------------|------------------|-----------------|----------------------|------------------|-----|---------------|-------------------------------|-------------|-------------|--------------------|---------------|------------------|----------|---------------|------------|------|
| Allstate Financial Services | | | | | | | | | | | | | | | | | X | | | | | | | | | | | | | | | | | | | |
| Ameriprise | | | | | | | | | | | | | X | | | | X | | | | | | | | | | | | | | | | | | | |
| Avantax Investment Services | | | | | | | | | | | | | X | | | | | | | | | | X | | | | | | | | | | | | | |
| Cambridge Investment Research | X | | | | X | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Commonwealth Financial | | X | | | | | X | | X | | | | X | | | | X | | | | | | | X | | | | | | | | | | | | |
| CUSO Financial Services | | | | X | | | | | | | | | | | | | X | X | | | | | | | | | | X | | | | | | | | |
| Edward Jones | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| J.P. Morgan Chase | | | | | | | | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | |
| LPL Financial | | X | | | | X | | | X | X | X | X | X | | | | X | | | X | X | | X | X | X | X | X | X | X | | | | | | | X |
| Merrill Lynch | | | X | | | | | | | | X | | X | | | | | | | | | | | | | | | X | | | | | | | | |
| Morgan Stanley | | | | | | | | | | | | | X | | | | | | | | | | | | | | | X | | | | | | | | |
| New York Life | | | | | | | | | | | X | X | X | | | | X | | | | | | | | | | | X | | | | | | | | |
| Northwestern Mutual | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| OneAmerica Securities | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PNC Investments | | | | | | | | | | | | | | X | | | | | X | | | X | | | | | | X | | | | | | | | |
| Primerica | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Raymond James | | | | | | | | | | | | | X | | | | X | | | | | | | | | | | | | | | | | | | |
| RW Baird | | | | | | | | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Wells Fargo | X | | | | | | | X | | | | X | X | | | X | | | | | | | X | | | X | | | | | | X | X | X | | |

WHO'S PAYING YOUR PLANNER?

New York Life Mutual Funds

Advisory Firm



Allstate Financial Services

Ameriprise

Avantax Investment Services

Cambridge Investment Research

Commonwealth Financial

CUSO Financial Services

Edward Jones

J.P. Morgan Chase

LPL Financial

Merrill Lynch

Morgan Stanley

New York Life

Northwestern Mutual

OneAmerica Securities

PNC Investments

Primerica

Raymond James

RW Baird

Wells Fargo

| | Wisconsin Capital Funds | Wisdom Tree | W&S Financial Group | Yorktown Artisan Partners | Zacks Investment | 1919 Investment | 1290 Funds | 13D Activist Funds | 361 Capital | Reference |
|--|-------------------------|-------------|---------------------|---------------------------|------------------|-----------------|------------|--------------------|-------------|--------------------|
| | | | | | | | | | | 1 |
| | | | | | | | | | | 2 |
| | | | | | | | | | | 3 |
| | X | | | | | | | | | 4 |
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| | | | | | | | | | | 6 |
| | | | | | | X | | | | 7 |
| | | | | | | | | | | 8 |
| | | | | | | | | | | 9 |
| | X | X | X | X | X | X | X | X | | 10 |
| | | | | | | | | | | 11 |
| | | | | | | | | | | 12 |
| | | | | | | | | | | 13 |
| | | | | | | | | | | 14 |
| | | | | | | | | | | 15 |
| | | X | | | | | | | | 16 |
| | | | | | | | | | | 17 |
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| | | | | | | | | | | 19 |
| | | | | X | | | | | | 20 |