



**KAIZERMAN & ASSOCIATES**  
FINANCIAL ADVISORS

**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 Kaizerman & Associates (K&A) advisory services and fees. Fees may be negotiable. The fees below will only apply to you when you request the services listed.

<b>Fees Charged by Investment Adviser</b>	<b>Fee Amount</b>	<b>Frequency Fee is Charged</b>	<b>Services</b>
Assets Under Management Fee	Vary between .375% - .200%	Quarterly	Portfolio management for individuals and small businesses; and Financial planning services
Hourly Fee	\$150 - \$300	As Agreed	Financial Planning
Subscription Fee	\$0	N/A	N/A
Fixed Fee	\$1,750 - \$10,000	One Time as Agreed	Financial Planning
Commissions to the Adviser	\$0	N/A	N/A
Performance-based Fee	\$0	N/A	N/A
Other – Beneficiary Directory	\$750	One time	Beneficiary Directory Service
<b>Fees Charged by Third Parties</b>	<b>Fee Amount</b>	<b>Frequency Fee is Charged</b>	<b>Services</b>
Third Party Money Manager	\$0	N/A	N/A
Robo-Adviser Fee	\$0	N/A	N/A

**Talk with your Adviser about fees and costs applicable to you**

**Additional fees and costs to discuss with your Adviser**

<b>Additional Fees/Cost</b>	<b>Yes/No</b>	<b>Paid To</b>
Brokerage Fees	Yes	Broker Dealer
Commissions	No	
Custodian Fees	Yes	IRA Custodian
Mark-ups	No	
Mutual Fund/ETF Fees and Expenses	Yes	Mutual Fee/ETF Provider

Effective Jan 1, 2026