



WEALTH MANAGEMENT LLP

Total Costs Example – 2023
Assumes Medium Risk Portfolio Vantage Earth 60
£500,000 Investment

Initial Costs (payable on completion of investments)

Clearwater Wealth Management	1.0000%	of funds under influence
Custody	0.0000%	
Investment Funds	0.0400%	
Total Initial Costs	1.0400%	

Ongoing Costs (per annum)

Clearwater Wealth Management	1.0000%	of funds under influence
Custody	0.2780%	
Investment Funds	0.4430%	
Total Ongoing Costs	1.7210%	