DeCamilla Capital ManagementCircle of Service



Serves as *fiduciary* for Client (You): Manages security portfolio for individual clients. Does not use or recommend third-party products. Compensated by clients alone on a *strict fiduciary* basis.

SERVICES

ASSET FEE

CLIENT (YOU):

At-will contract with DeCamilla Capital. Custom portfolio management services include: Advice, Consulting, Securities Selection, Asset Allocation, Performance Reporting, and Research.

INFO & REPORTS

DISCOUNT LOW TRADE COSTS

INDEPENDENT CUSTODIAN

Any established bank and/or trust company or Schwab Advisor Services. Services include: Asset Custody, Securities Trade Execution, Tax Reporting, Monthly Statements, Securities Investor Protection, Corporation (SPIC) Insurance.