

Entrust Client Update

This past year we have been working to design a new fee schedule to better meet our clients' needs.

Why Are We Developing a New Fee Schedule?

Historically, fees in the self-directed IRA industry have been far too complicated. Why should you need to pull out a calculator to figure out your fees?

There has also been a focus in the industry on charging clients per asset. We have found that this is likely to disadvantage clients who want to use their self-directed accounts to invest in a wide variety of alternative investments.

Our goal has been to create a new fee structure that:

- simplifies our fees to be easy to calculate and understand.
- provides more flexibility to invest in any number of assets without being penalized for diversifying your portfolio.
- provides a more accessible way for investors with small portfolios to begin investing in alternative investments.

What Does This Mean for Current Clients?

In order to allow us to provide you with the best possible service, this new pricing model is currently being tested. Once we have completed the testing phase of this pricing model, we plan to extend our new Annual Fee Schedule to our clients.

We will communicate the details of this pricing change with you well in advance of the large-scale implementation. We are excited about the possibilities for this new pricing model to allow self-directed investors to invest with greater ease and flexibility.

We know that investing is a highly personal experience, and providing opportunities for each of our clients to self-direct their accounts in a way that works well for them is our priority.

In the meantime, if you want to refer to the current fee schedule you are on, click [here](#).