



Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”) for more details of Clarity Wealth Management LLC advisory services and fees, respectively. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees may be negotiable.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services	
Assets Under Management Fee	First \$1-\$499,999.99	1.25%	Quarterly in arrears	Portfolio management for individuals
	Next \$500,000 (\$500,000-\$999,999.99)	1.00%		
	Next \$2,000,000 (\$1,000,000-\$2,999,999.99)	0.75%		
	Next \$2,000,000 (\$3,000,000-\$4,999,999.99)	0.65%		
	Subsequent amounts (\$5,000,000+)	0.55%		
	No more than 1% annually on all assets	Quarterly or monthly in arrears or in advance	ERISA Plans	
Hourly Fee	\$175	Due upon plan delivery	Financial planning services	
Subscription Fee	\$0	n/a	n/a	
Fixed Fee	<ul style="list-style-type: none"> \$1,500 and \$5,000 one-time plan \$1,200 to \$24,000/year for ongoing services 	<ul style="list-style-type: none"> Due upon plan delivery Due quarterly in arrears 	Financial planning services	
Commissions to the Adviser	Variable dependent upon product Typically ranging from 0-7% per product	Variable per contract; paid initially and/or trails paid annually	Fixed insurance sales and services	
Performance-based Fee	\$0	n/a	n/a	
Other	\$0	n/a	n/a	
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services	
Third Party Money Manager Gradient Investments, LLC	1.00% - 2.00%	Quarterly in arrears	Third Party money management	
Sub-Advisors	.12% - .75%	Quarterly in arrears	Sub-Advisor	
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

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	Charles Schwab
Commissions	No	N/A
Custodian Fees	Yes	Charles Schwab
Mark-ups	No	n/a
Mutual Fund/ETF Fees and Expenses	Yes	Broker, Mutual fund company & ETF providers, such as Vanguard, Black Rock or Hartford as they disclose.

Effective November 28, 2023