



**Nvest Financial Group, LLC
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 Nvest Financial Group, LLC’s advisory services and fees. Fees are negotiable. The fees may not apply to all clients. The fees below will only apply to you when you request the services listed.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	0.30% - 1.37% annually based on assets under management	If/when plan is implemented	Portfolio management
Hourly Fee	Up to \$275 per hour	When services are rendered	Financial planning services
Subscription Fee	\$0	n/a	n/a
Fixed Fee	\$1,750 - \$3,500	When services are rendered	Financial planning services
Commissions to the Adviser	Up to 100% of initial insurance premium. 1%-25% of renewal insurance premium. Up to 5.75% for open end mutual funds. Up to 1.3% for stock/ETF trades. Up to 2.5% on bond trades. Up to 3% on closed end mutual fund trades	If/when plan is implemented	Insurance, annuities and non-managed brokerage accounts
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	\$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

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	National Financial Services and Commonwealth
Commissions	Yes	National Financial Services and Commonwealth
Custodian Fees	Yes	National Financial Services
Mark-ups	Yes	National Financial Services/Commonwealth
Mutual Fund/ETF Fees and Expenses	Yes	Various Companies

Effective 1/1/2020