Copper Beech Wealth Management
Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A ("Brochure") for more details of Copper Beech Wealth Management 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	1%	Quarterly in Arrears	Portfolio Management for Individuals and/or small businesses
Hourly Fee	$0	N/A	N/A
Subscription Fee	$0	N/A	N/A
Fixed Fee	$250-$5000	Once	Financial planning services
Commissions to the Adviser	$0	N/A	N/A
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. - 0.25%	Monthly in Arrears	Portfolio Management for Individuals and/or small businesses
Robo-Adviser Fee	$0	N/A	N/A
Talk with Cooper Beech Wealth Management about fees and costs applicable to you			

Additional fees and costs to discuss with your Advisor

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	Fidelity Investments
Commissions	Yes	Fidelity Investments
Custodian Fees	Yes	Fidelity Investments
Mark-ups	No	N/A
Mutual Fund/ETF Fees and Expenses	Yes	Mutual Fund/ETF company

November 10, 2026

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