

Collaborative Wealth Advisors, 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 Collaborative Wealth Advisors, LLC advisory services and fees. Fees may be negotiable. 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	First \$500,000 1.00% Next \$500,000 0.80% Next \$500,000 0.70% > \$1.5 Million 0.50% Alternatively annual fixed fee ranging from \$1,500 to \$15,000	Quarterly in Arrears	Portfolio Management to include Financial Planning Services
Hourly Fee	\$250 Alternatively fixed fee ranging from \$800 to \$4,000.	Services Rendered	Financial Planning Services
Subscription Fee	None	N/A	N/A
Fixed Fee	Annual fixed fee, ranging from \$500 to \$15,000	Annual or Quarterly in Arrears	Retirement Plan Advisory
Commissions to the Adviser	None	N/A	N/A
Performance-based Fee	None	N/A	N/A
Other	None	N/A	N/A
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager	None	N/A	N/A
Robo-Adviser Fee	None	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	Fidelity, TD Ameritrade
Commissions	No	N/A
Custodian Fees	No	N/A
Mark-ups	No	N/A
Mutual Fund/ETF Fees and Expenses	Yes	Various Mutual Fund & ETF Companies

Effective 3-20-2023