

Appletree Financial Services, LLC

Table of Fees for Services

Carefully read Items 4 & 5 of Form ADV Part 2A for more details on Appletree Financial Services, LLC's advisory services and fees. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees are negotiable.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Service(s)
A percentage of assets under your management	Investment Management Service \$500,001 - \$2,000,000 1.00% \$2,000,001 and Above 0.75%	Quarterly in advance	Portfolio management for individuals and/or small businesses
	Pension Consulting Services 0.85%	Quarterly in advance	Pension Consulting Services
Hourly Fee	\$0	N/A	N/A
Subscription fees (for a newsletter or periodical)	\$0	N/A	N/A
Fixed fees (other than subscription fees)	\$0 - \$10,000	One-time upfront	Financial Planning
	\$3,500 - \$10,000	Quarterly in advance	Financial Planning
	\$10,000		Portfolio management for individuals and/or small businesses
Commissions	\$0	N/A	N/A
Performance-based Fee	\$0	\$0	\$0
Other	\$0	\$0	\$0
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager Fee	0.00% - 1.00%	Quarterly in advance	Selection of other Advisors
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	Altruist Financial, LLC
Commissions	No	N/A
Custodian Fees	Yes	Altruist Financial, LLC

Effective 6/23/2026

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Mark-Ups	No	N/A
Mutual Fund / ETF Fees & Expenses	Yes	Each exchange-traded fund (ETF) and mutual fund manager has their own underlying investment fee and expense which is charged directly to the net asset value of the security. More information regarding such fees is available in the security prospectus.