



CLEAR VIEW WEALTH ADVISORS, LLC
Plan Well. Invest Smart. Live Better.

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 Clear View Wealth Advisors, LLC’s 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 *	Robo-Adviser * (0.40%/yr) AUM with Separate Plan Fee * (\$240 min to 1.75%/yr) AUM with Planning Included * (0.60% to 0.80%/yr) Fixed-Fee with Planning *	Monthly or Quarterly in Arrears (depends on Custodian)	Portfolio Management
Hourly Fee	\$100 to \$350 based on complexity	Billed Monthly as Incurred	Financial Planning
Subscription Fee	\$0	N/A	N/A
Fixed Fee *	\$300 to \$50,000/year *	Monthly or Quarterly	Financial Planning
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 (TPMM)	0.20%/yr to 0.60%/yr by TPMM	Quarterly in Arrears	Portfolio Management
Robo-Adviser Fee	0.25%/yr on AUM by Robo-Adviser	Quarterly in Arrears	Portfolio Management
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	Interactive Brokers, Goldman Sachs/Folio, Altruist Financial, if applicable
Commissions	No	N/A
Custodian Fees	Yes	Various Custodians – AssetMark, Goldman Sachs/Folio Investments, Altruist Financial, CNB Custody
Mark-ups	Yes	Bond Dealer if applicable
Mutual Fund/ETF Fees and Expenses	Yes	Mutual fund or ETF as applicable

* See Form ADV 2A, Item 5

Effective January 1, 2025