

A clear fee. A complete partnership.

Transparent, fee-only fiduciary advice with no commissions - designed around your life, your decisions, and your long-term financial well-being.

OUR ANNUAL ADVISORY FEE

Simple, transparent, and tiered

Fees are based on assets under management, calculated in tiers, and paid quarterly in arrears.

1.00%

First \$2 million

0.75%

\$2 million-\$5 million

0.50%

Assets over \$5 million

Minimum annual fee: \$10,000

Tiered means each rate applies only to assets within that tier.

What your fee supports

- **Integrated financial planning**
Retirement, cash flow, insurance, estate, education, and legacy decisions coordinated in one strategy.
- **Proactive lifetime tax planning**
Ongoing evaluation of tax-sensitive decisions – not just a once-a-year tax conversation.
- **Disciplined investment management**
A portfolio built for your goals, risk, liquidity needs, and full financial picture.
- **A team that knows your life**
Research, monitoring, communication, and guidance as your circumstances and laws change.

Why fee-only fiduciary advice matters

- **No commissions. No hidden products.**
As a fee-only firm, Briaud does not sell insurance, mutual funds, or annuities for commissions.
- **Fewer conflicts. Cleaner alignment.**
Our recommendations are not driven by sales quotas, product incentives, or behind-the-scenes kickbacks. We are paid for advice, so our interests align with your long-term financial well-being.
- **Clear and honest pricing.**
You know exactly how much you pay and what services you receive in return.
- **A legal fiduciary duty to put you first.**
Briaud is obligated to act in your best interests at all times. Our advice for taxes, retirement, investments, and planning is made to help you succeed.



The goal is not simply to manage money. It is to improve financial decisions.

Our fee is for coordinated, objective, client-first advice across taxes, retirement, investments, and major life transitions. Better decisions, fewer surprises, and greater alignment can create meaningful value over time.

BRIAUD FINANCIAL ADVISORS
Fee-only. Fiduciary. Client first. Since 1986.

briaud.com | 979-260-9771
Fees and services are subject to the terms of the advisory agreement and applicable disclosures.