LEVENSON
WEALTH 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 Levenson Wealth LLC advisory services and fees. Fees may be negotiable under limited circumstances. The fees below will apply to you:

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	1% on first $2.5MM .50% on next $2.5MM .25% above $5.0MM	Quarterly in arrears	Financial Planning and Investment Management*
Hourly Fee	$0	NA	NA
Subscription Fee	$0	NA	NA
Fixed Fee	$0	NA	NA
Commissions to the Adviser	$0	NA	NA
Performance-based Fee	$0	NA	NA
Other	$0	NA	NA
Fees Charged by Third Parties	**Fee Amount**	**Frequency Fee is Charged**	**Services**
Third Party Money Manager	$0	NA	NA
Robo-Adviser Fee	$0	NA	NA
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	Charles Schwab & Co
Commissions	No	
Custodian Fees	No	
Mark-ups	No	
Mutual Fund/ETF Fees and Expenses	Yes	Vanguard, DFA

* LW services are designed for clients with portfolios of at least $1,500,000

January 1, 2023