

SW Private Wealth, LLC

75 Second Avenue, Suite 605
Needham, MA 02494

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 SW Private Wealth, LLC advisory services and fees. Fees may be negotiable. The fees below will only apply to you when you request the services listed.

Different fees may represent alternative payment options for similar services or combinations of services. Talk with SW Private Wealth, LLC about what services are appropriate for you and the fees that will apply.

| Fees Charged by Investment Adviser | Fee Amount | | Frequency Fee is Charged | Services |
|------------------------------------|--|---------------------------------------|--------------------------|--|
| Assets Under Management Fee | \$0 - \$500,000 \$500,001 - \$1,000,000 \$1,000,001 - \$10,000,000 Above > \$10,000,001 | 1.50% 1.25% 1.00% negotiable | Quarterly in advance. | Portfolio management for individuals and/or small businesses |
| Hourly Fee | \$250 | | Per Hour | Financial planning |
| Subscription Fee | \$0.00 | | N/A | N/A |
| Fixed Fee | \$4,500 - \$7,500 Additional plans are 40-50% of the initial plan fee. | | Per Project | Financial planning |
| Commissions to the Adviser | \$0.00 | | N/A | N/A |
| Performance-based Fee | \$0.00 | | N/A | N/A |
| Other | Annual fee not to exceed .50% | | Quarterly in advance | Assets Under Advisement |

| Fees Charged by Third Parties | Fee Amount | Frequency Fee is Charged | Services |
|-------------------------------|------------|--------------------------|----------|
| Third Party Money Manager | \$0.00 | N/A | N/A |
| Robo-Adviser Fee | \$0.00 | N/A | N/A |

Talk with SW Private Wealth, LLC about fees and costs applicable to you.

For Additional Discussion with Your Adviser:

| Additional Fees/Cost | Yes/No | Paid To |
|-----------------------------------|--------|---|
| Brokerage Fees | Yes | Charles Schwab |
| Commissions | Yes | Charles Schwab |
| Custodian Fees | Yes | Charles Schwab |
| Mark-ups | Yes | Charles Schwab |
| Mutual Fund/ETF Fees and Expenses | Yes | Each mutual fund/ETF in which you are invested. |