

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 Leverage Financial Advisory, LLC 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 Advisor	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	0.50% - 1.00% Legacy Minimums: (\$600 - \$1,008)*	Quarterly in Arrears	Portfolio management for individuals and/or small businesses; and Financial planning services; Pension consulting services
Hourly Fee	\$300	½ Upfront, Balance at completion	Portfolio management for individuals and/or small businesses; Financial planning services; Pension consulting services; and Educational seminars/workshops
Subscription Fee	\$1,200 – Individual \$2,400 - Joint	Quarterly in Arrears	Portfolio management for individual; Financial planning services
Fixed Fee	\$2,500 - \$5,000 Negotiated	Upfront	Financial planning services; Pension consulting services; and Educational seminars/workshops
Commission to the Advisor	\$0	n/a	n/a
Performance-based Fee	\$0	n/a	n/a
Other – Assets Under Consultation	0.50% - 1.00%	Monthly / Quarterly in Arrears	Portfolio management for individuals and/or small businesses; Pension consulting services
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third-Party Money Manager	\$0	n/a	n/a
Robo-Advisor Fee	\$0	n/a	n/a

Talk with your Advisor about fees and costs applicable to you

Additional fees and costs to discuss with your Advisor

Additional Fees/Costs	Yes/No	Paid To
Platform Fee	No (Paid by LFA)	Pontera
Brokerage Fees	Yes	Interactive Brokers LLC, Altruist Financial LLC, and Matrix Trust Company
Commissions	Yes	Interactive Brokers LLC, Altruist Financial LLC, and Matrix Trust Company
Custodian Fees	Yes	Interactive Brokers LLC, Altruist Financial LLC, and Matrix Trust Company
Mark-Ups	Yes	Interactive Brokers LLC and Altruist Financial LLC
Mutual Fund/ETF Fees and Expenses	Yes	Each exchange-traded fund (ETF) and mutual fund manager has their own underlying investment fees and expenses typically referred to as the “expense ratio”. More information regarding such fees is available in each security prospectus.

Effective March 28, 2026

*Includes legacy arrangements no longer offered to new clients. See Item 5 of Form ADV Part 2A for details.