



Bill of Rights for All Clients of Passive Capital Management, LLC

We value our relationships and know that informed clients will be happy clients. As a result, we encourage every client of ours to:

- ④ **Ask for and receive information about our firm** as well as background information on the investment professionals. Much of this information is outlined in our Form ADV as filed with the Securities & Exchange Commission. You may also find information about investment advisory firms at: http://www.adviserinfo.sec.gov/IAPD/Content/iapdMain/iapd_SiteMap.aspx.
- ④ Receive information about **the risks, obligations, and costs** of investing with us.
- ④ Receive a copy of all completed **account applications** and the **investment advisory agreement**.
- ④ Receive **account statements that are clear, concise, and easy to understand**.
- ④ **Receive an invoice** that clearly outlines the quarterly fees.
- ④ **Understand** as much of the investment process and philosophy as you would like.
- ④ **Access your funds in a timely manner** without any penalties or back-end fees imposed by Passive Capital Management, LLC.
- ④ Discuss your goals and objectives with the investment advisor of your choice – **you control the relationship**.
- ④ Receive **independent confirmation of the activity in your account from the custodian** (Charles Schwab & Co.).

You work hard for your money so make sure that your money is working hard for you. Ask questions and be skeptical until you understand all that you care to know.

Scott D. Reinhardt, CFA

Principal and Co-founder

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A registered investment advisor