

Mr & Mrs Sample

Insight 360° Fee Index



Current Fee Index

Portfolio Assets: \$1,200,000

1.6%

\$19,200 / yr

Your current annual advisory fee

Canadian Average Fee Index

\$1M – \$2M

1.09%

\$13,080 / yr

Industry average for this portfolio tier

Annual Fee Difference: \$6,120

Wealth Impact

A 0.51% annual fee difference on a \$1.2M portfolio can result in significant additional wealth over time. Capital efficiency is the silent driver of long-term financial success.

\$420,000+

Value lost to excess fees over 20 years