

Foster Group

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Since 1989, [Foster Group](#) has focused on delivering investment management, advanced financial planning, and retirement plan consulting services to physicians. We serve [medical professionals](#) who we hope appreciate our independent, fee-only, integrated approach to financial planning and investment management.

Our [financial advisors](#) work with [individuals](#), trust funds, [retirement plans](#), [nonprofit and for-profit organizations](#), and fiduciaries to preserve capital, grow assets, and manage marketplace risk. The Team at Foster Group is committed to helping you feel *Truly Cared For*[™].

[Click here for a complimentary second opinion today](#) and/or [download our free e-book](#) containing the five investment fundamentals every physician should know.

PLEASE NOTE LIMITATIONS: Please see Important Advertising Disclosure Information and the limitations of any ranking/recognitions, at www.fostergroup.com/advertising-disclosure/. A copy of our current written disclosure statement as set forth on Part 2A of Form ADV is available at www.adviserinfo.sec.gov.



Click here to download our
FREE E-BOOK
containing the five investment
fundamentals every physician
should know.

- Services: Financial planning, investment management
- Fee Structure: Flat-fee, AUM fee
- Location: Des Moines, IA and Omaha, NE

- [Foster-Group-Financial-Advisor-Application](#), ADV2
- [Website](#), communications@fostergrp.com, (800)798-1012

Fee Structure:

A Minimum quarterly fee of \$750

Individuals:				
Account Value	Annual Fee Schedule {on marginal dollars}			
Up to \$1,000,000	1.00%			
\$1,000,001-\$2,000,000	0.75%			
\$2,000,001-\$3,000,000	0.60%			
\$3,000,001-\$5,000,000	0.50%			
\$5,000,001-\$25,000,000	0.40%			
\$25,000,001 and above	0.30%			
Institutions:				
Account Value	Annual Fee Schedule {on marginal dollars}			
Up to \$2,000,000	0.75%			
\$2,000,001-\$3,000,000	0.60%			
\$3,000,001-\$5,000,000	0.50%			
\$5,000,001 and above	0.40%			

E.g. the Annual Fee Schedule for an Account Value of \$2,568,652 would read as follows: $(\$1,000,000 \times 1.00\%) + (\$1,000,000 \times .75\%) + (\$568,652 \times .60\%) = \text{Total Annual Fee}$