



Max is an intelligent cash management service that provides investors with dramatically higher yield and broader FDIC insurance coverage on cash.

Max monitors interest rates daily and helps clients ensure their funds are kept within FDIC limits while earning the highest rates each month. Clients maintain direct access to all funds with same-day liquidity, if needed.

Clients can use Max Checking to earn more on a discrete amount of cash (i.e. for an emergency fund) or link a supported primary checking account to benefit from a cash sweep capability that will help them keep their checking account at a target balance each month.

Supported Checking / Brokerage Accounts:

Max Checking:

- Integrates seamlessly into Max
- Opens in 60 seconds
- Connects to checking, savings, and brokerage accounts at thousands of financial institutions
- Can be used as a full featured, high-yield account

Or, clients can link Max directly to their existing checking account at:

Bank of America	JP Morgan / Chase
Citibank	Wells Fargo
BB&T	BBVA Compass
Charles Schwab Bank	City National Bank
E*Trade Bank	Fidelity CMA
Fifth Third Bank	First Republic Bank
Huntington Bank	SunTrust
TD Bank	USAA
US Bank	Zions Bank

Supported Online Savings Accounts:

Bank	Current Rate (APY) (as of 7/14/2021)
Customers Bank	0.60% *
Quontic Bank	0.55% *
Ally Bank	0.50%
American Express	0.40%
Barclays	0.40%
Sterling National Bank	0.26%
LendingClub Bank	0.26%
UFB Direct, a division of Axos Bank	0.20%

*Preferred rate and terms exclusively for Max members

Weighted Average Yield	Individual	Joint
up to \$250,000	0.60%	0.60%
\$500,000	0.58%	0.60%
\$1,000,000	0.51%	0.58%
\$2,000,000	0.40%	0.51%
\$4,000,000	N/A	0.40%

Terms / Yield:

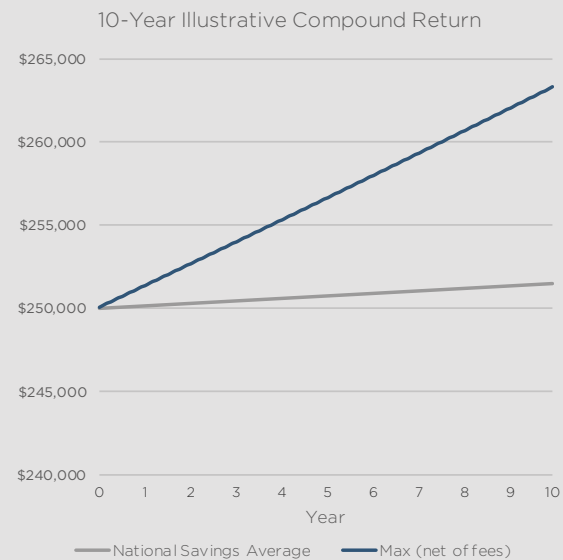
Minimum deposit	\$1
Maximum deposit	no limit
FDIC insurance - individual	up to \$2.0mm
FDIC insurance - joint	up to \$4.0mm

Liquidity: Daily (wire) / 1-3 day (ACH)
Funds are held in client's own bank accounts

Gross Annual Yield - up to \$250k	0.60%
Expense Ratio (0.02% per quarter)	0.08%
Net Yield	0.52%
vs. National Savings Average	0.06%
Net Incremental Yield ("Alpha")	0.46%

Illustrative 10 Year Compounded Performance:

Initial Balance	\$250,000
After 10 Years - National Avg.	\$251,504
After 10 Years - Max (gross)	\$265,455
After 10 Years - Max (net)**	\$263,340
Net Incremental Yield	\$11,835



**Shown net of Max's fee of 0.02% per quarter, paid by the client

For more information, visit MaxForAdvisors.com

Max is a service of Six Trees Capital LLC. 445 Park Avenue, 9th Floor, New York, NY 10022

FDIC Insured