

Cambyses Financial Advisors LLC

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Managing Member:
Nastaran Motiei MBA
CRD # 5836735

Managing Member:
Compliance Officer
Steven J Roy MST EA
CRD # 6499057

Investment Advisor
Marisa
Schwartz-Yafai
CRD # 4806962

Cambyses Affiliated Company Disclosure

To:
From: Cambyses Financial Group
Date:

This gives you notice that each and all of the companies of Cambyses Capital has a business relationship with each other company within the Group.

Each of the companies that comprise the Cambyses Capital is wholly owned by fewer than five individuals or legal persons. Majority interest in each of the Companies is held by two individuals (Nastaran Motiei and Steven J Roy). Because of this relationship, any referral for service to any company within Cambyses Capital may provide the referring party a financial or other benefit.

Set forth below is the estimated charge or range of charges for the services provided by each of the Companies that form Cambyses Capital.

You are NOT required to use the listed provider(s) as a condition for doing business with any other Company in Cambyses Capital.

THERE ARE FREQUENTLY OTHER SERVICE PROVIDERS AVAILABLE WHO OFFER AND PROVIDE SIMILAR SERVICES. YOU ARE FREE TO SHOP AROUND TO DETERMINE THAT YOU ARE RECEIVING THE BEST SERVICES AND THE BEST RATE FOR THOSE SERVICES.

ACKNOWLEDGMENT

I/we have read this disclosure form, and understand that Cambyses Financial Advisors is referring me/us to purchase the above-described service(s) and may receive a financial or other benefit as the result of this referral.

Client Signature and Certification:

Client Name Print: _____

Signature: _____ Date: _____

Client Name Print: _____

Signature: _____ Date: _____

Please direct compliance or regulatory inquiries to our CCO: Steven@CambysesCapital.com

Cambyes Capital — Affiliated Companies

<i>Provider and Service</i>	<i>Charge or Range of Charges</i>
<i>Cambyes Capital</i> 1. Parent company, Group administrator, Common paymaster.	1. Performs services only for other group members.
<i>Cambyes Capital DBA Steven J Roy Management</i> 1. Business Management Services 2. Business financial measurement, analysis, or planning (strategic, tactical, or transactional) 3. Succession and estate planning 4. Tax planning, management, compliance, and representation	All; Hourly fees at rates from \$95-\$295/hour determined by the nature of the service. Project service fees based on negotiated agreements between Cambyes and our client.
<i>Cambyes Capital DBA Cambyes Insurance Agency</i> 1. Insurance brokerage services for Life, Health, Long Term Care, and Disability Insurance 2. Benefit Plan consultation and implementation 3. Insurance Based Estate Planning services including succession and estate planning	1. Commission paid by policy issuer. 2. Hourly fees at rates from \$95-\$295/hour determined by the nature of the service. 3. Hourly fees at rates from \$95-\$295/hour determined by the nature of the service.
<i>Cambyes Capital DBA Cambyes Realty Services</i> 1. Analytics, due diligence, and feasibility studies (portfolio or single property) 2. Buyer Representation for commercial, industrial, or multi-family properties 3. Seller Representation for commercial, industrial, or multi-family properties 4. Property syndication	1. Hourly fees at rates from \$95-\$295/hour determined by the nature of the service. 2. Cooperative participation in fee of listing agent, typically 1%-3.5% of sale contract price. 3. Listing Agent commission, typically 1% to 8% of purchase contract. Less, sellers commission, typically 1%-3.5% of purchase contract. 4. Hourly fees at rates from \$95-\$295/hour determined by the nature of the service. Seller or buyer representation for 1-4 residential property is generally referred to other brokers. We may receive a referral commission for this referral, typically 10% to 25% of the referred agent's net commission.
<i>Under Common Ownership Cambyes Financial Advisors, LLC</i> 1. Investment advisory, portfolio and wealth management 2. Financial and estate planning 3. ERISA Plan Services 4. Retirement Planning Services	1. Asset based fees – 0.5% to 2.5% of assets under management 2. Hourly fees at rates from \$95-\$295/hour determined by the nature of the service. 3. Hourly fees at rates from \$95-\$330/hour determined by the nature of the service. 4. Flat fee, typically \$1,250-\$2,000