

While WiseBanyan does not charge a basic management fee, there are potential circumstances in which our broker-dealer will charge a one-time fee. Please review the schedule below for more information.

Commission Rates

Management Fee	Free
Trading Fees	Free
Rebalancing Fee	Free

Transfer Fees (Charged by broker-dealer)

Electronic Fund Transfer (EFT) Deposits and Withdrawals	Free
Wire Transfers In	Free (your bank may charge you)
Wire Transfers Out Wiring cash from us to another financial institution.	\$30 per wire
Account Closing Fee Liquidate all securities, withdraw cash	Free
Full Account Transfer Out Fee Applied when you transfer your entire account to another brokerage firm.	\$100 per account
Partial Account Transfer Out Fee Applied when you transfer some of the securities (e.g., stocks) in your account to another brokerage.	\$5 per security (\$25 min / \$75 max)
Disbursement of Funds by Check by Mail You can avoid this fee by using an EFT from your account.	\$20 per check

Returned EFT or Check

Applied when Non-sufficient Funds (NSF) result in a failed Electronic Funds Transfer request or returned check

\$35 per occurrence

Paper Statement Fees:

Electronic Statements

These are the only ones you need!

Free

Paper Copies of Account Statements & Confirmations

Available via request

\$10 per statement or confirmation request

Mail Delivery of Monthly Statements

\$150 per year