



TOTAL NET WORTH OR ASSETS UNDER MANAGEMENT MINIMUMS REQUIRED TO QUALIFY

For US clients, the Securities and Exchange Commission (SEC) will not allow us to offer a Performance Based Fee Structure unless certain Total Net Worth or Assets Under Management requirements are met.

The SEC requirements for US clients to work with CTA under our “pay for performance” philosophy are to have either:

- US\$1.5 million minimum Total Net Worth (including spousal assets)
- OR
- US\$750,000 under CTA management

To accommodate US clients who do not qualify for the Performance Based Fee Structure under the SEC requirements, we can offer Cara Select Portfolio accounts that feature an Asset Based Fee Structure.

For information about Cara Select Portfolio accounts, email: CaraSelect@CaraTrading.com

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CTA is a Registered Investment Advisor (SCB, SEC)

“I believe in sovereignty of the individual and in our need to build and rely upon both family and social networks in order to improve society and build ‘wealth’ that includes, in addition to material wealth, a healthy lifestyle and bountiful social capital.”

~ Bill Cara