



Table of Fees For Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”), as these sections of the Brochure contain important details about CCM Investment Management, LLC advisory services and fees. Fees may be negotiable. The fees below will only apply to you when you request the services listed.

Fees Charged By Investment Adviser	Fee Amount		Frequency Fee is Charged	Services
Assets Under Management Fees	\$0 - \$50,000	1.55%	Monthly in advance	Wrap-Fee Portfolio management for individuals and/or small businesses
	\$50,000 - \$250,000	1.40%		
	\$250,000 - \$500,000	1.25%		
	\$500,000 - \$1,000,000	1.05%		
	\$1,000,000 - \$2,000,000	0.80%		
	\$2,000,000 - \$5,000,000	0.65%		
	\$5,000,000 – And Up	0.50%	Monthly in advance or arrears	Portfolio management for individuals and/or small businesses
	\$0 - \$50,000	1.45%		
	\$50,000 - \$250,000	1.30%		
	\$250,000 - \$500,000	1.15%		
	\$500,000 - \$1,000,000	0.95%		
	\$1,000,000 - \$2,000,000	0.75%		
	\$2,000,000 - \$5,000,000	0.60%		
	\$5,000,000 – And Up	0.45%		
Hourly Fee	\$150	50% of estimate in advance, balance due at completion	Financial planning services	
Subscription Fee	\$0	n/a	n/a	
Fixed Fee	\$0	n/a	n/a	
Commissions to the Adviser	Varies	As needed	Other	
Performance-based Fee	\$0	n/a	n/a	
Other	\$0	n/a	n/a	
Fees Charged by Third Parties				
Third Party Money Manager	\$0	n/a	n/a	
Robo-Adviser Fee	\$0	n/a	n/a	
Talk with CCM Investment Management about fees and costs applicable to you				

Additional fees and costs to discuss with your Adviser

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	No	Various
Commissions	Yes	Various Insurance Companies
Custodian Fees	Yes	Various
Mark-Ups	No	n/a
Mutual Fund/ETF Fees and Expenses	Yes	Various Mutual Funds and ETFs