



Broadridge[®]

Broadridge Financial Solutions, Inc.
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June 26, 2022

Ms. Maggie Baer
Savant Capital, LLC d/b/a
Savant Wealth Management
190 Buckley Drive
Rockford, IL 61107
USA

CEFEX File: CFX-10030

The Centre for Fiduciary Excellence (CEFEX) has conducted a fiduciary assessment of **Savant Capital LLC d/b/a Savant Wealth Management** (the "Steward") to determine whether the Steward's practices conform generally to the fiduciary standards of excellence (referred to as the Fiduciary Practices) as defined by the *Prudent Practices for Investment Stewards (U.S. Edition)* handbook as published by Broadridge Fi360 Solutions (Fi360) (the Handbook).¹ Compliance with applicable legal and ethical practices is the responsibility of the Steward. The responsibility of CEFEX is to express an opinion on whether the Steward generally conforms to the Fiduciary Practices in the conduct of its business based on our assessment.

CEFEX conducted its assessment in accordance with the *Consultant's Assessment of Fiduciary Excellence for Investment Stewards (U.S. Edition)* (the CAFE) prepared by Fi360. The assessment was conducted, and a draft report was prepared by **CEFEX Analyst Roger Levy**. The CEFEX Analyst's work papers and draft report were reviewed by the CEFEX Registration Committee (CRC) to ensure impartiality. The assessment requires that the Analyst plan and perform a review of a representative sample of the

¹ The Handbook describing fiduciary best practices for investment stewards is available at www.Fi360.com.

Steward's written records, interviews with appropriate personnel of the Steward and, on a test basis, evidence supporting the actions taken by the Steward in providing services to its constituents. We believe that the Analyst's assessment and the CRC's review of the Analyst's report provides a reasonable basis for this Report and issuance of a Certificate of Registration to the Steward.

Neither this Report nor the Advisor's CEFEX Registration constitutes a financial audit of the Steward or a regulatory or compliance audit of the Steward's operations, and CEFEX expresses no opinion regarding the completeness or accuracy of the Steward's financial condition or financial statements or its compliance with applicable legal or ethical requirements with respect to any specific constituent. Neither this Report nor the Steward's CEFEX Registration provides assurance that the Steward will conform to the Fiduciary Practices or applicable legal or ethical requirements in any specific instance, and CEFEX disclaims any responsibility for such conformance.

In our opinion, based on the assessment referred to above, the Steward conforms to all Practices and Criteria defined in the Handbook as of **June 26, 2022** in the conduct of its investment business generally and is entitled to receive a CEFEX Fiduciary Certificate of Registration, which shall be valid for a period of 12 months.

CENTRE FOR FIDUCIARY EXCELLENCE
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