Fee Schedule

- Financial Planning upfront cost – **Varies based on scope of work**
  - **50%** due at engagement, **50%** due at delivery
  - Additional ongoing strategy and planning available for a monthly fee – **price varies based on level of effort**
    - Services include depreciation analysis, tax strategy, business planning, insurance strategies, retirement analysis, college planning, social security maximization, etc.
- Fee Based Pricing for Investment Management and Ongoing Financial Planning – Aggregated on a family relationship level
  - $0 to $1,000,000 | **1.1%**
  - $1,000,001 to $2,000,000 |**.95%**
  - $2,000,001 to $3,000,000 |**.85%**
  - $3,000,001 to $4,000,000 |**.75%**
  - $4,000,001 to $5,000,000 |**.65%**
  - $5,000,001 to $6,000,000 |**.55%**
  - $6,000,000+|**.45%**

**As breakpoints are reached fee is adjusted down*