



Flat Fee Planning Services

Basic

- Ongoing comprehensive financial planning
- Recommendations for customized portfolios for all investment accounts
- Annual rebalancing recommendations for all investment accounts
- Semi-annual strategic plan review and update meetings
- Phone calls and email communication up to 1 hour/mo. *(after the initial plan is completed)*

Typically for doctors in training and first two years as attendings

One-time setup fee \$1,000

Flat Retainer \$1,250/qtr.

Premium

- Ongoing comprehensive financial planning
- Asset management for household portfolios up to \$1M (you pay no AUM fees)
- Annual customized portfolio rebalancing
- Review and analysis of all financial/legal documents for planning opportunities
- Design and implementation of ongoing tax planning strategies
- Quarterly strategic plan review and update meetings
- Unlimited phone calls and email communication

Typically for new attendings without student loan debt (or using PSLF) and mid-career established attendings who are seeking professional investment management

One-time setup fee \$1,500

Flat Retainer \$2,500/qtr.

Concierge

- Ongoing comprehensive financial planning
- Asset management for household portfolios over \$1M (you pay no AUM fees)
- Annual customized portfolio rebalancing
- Review and analysis of all financial/legal documents for planning opportunities
- Personal income tax preparation, including design and implementation of ongoing tax planning strategies
- Meetings and strategic coordination with your financial team (attorney, banker, insurance agent)
- Develop and implement your personal philanthropy plan, including education and synchronization with your comprehensive financial plan and tax strategy
- Monthly check-ins and quarterly strategic plan review/update meetings
- Unlimited phone calls and email communication
- Annual family meeting (multi-generational). We will visit you or you are invited to visit us on our farm. Pets and children welcome!

Typically for HNW established attendings and retirees whose finances include complexities such as business ownership, trusts, multiple real estate investments, multi-generational transfers, etc.

One-time setup fee \$2,000

Flat Retainer \$3,750/qtr.