



# FINANCIAL PLANNING

OUR ANNUAL FINANCIAL PLANNING FEES ARE BILLED QUARTERLY IN ADVANCE

## PLAN TYPE AND FEE SCHEDULE

SIMPLE	MODERATE	COMPLEX
<u>One Goal</u>	<u>Two or Three Goals</u>	<u>Three or More Goals</u>
Simple tax situation	Moderate tax situation	Complex tax situation
Simple estate situation	Moderate estate situation	Complex estate situation
Simple asset structure	Moderate asset structure	Complex asset structure
\$1,000—\$2,500	\$3,000—\$5,000	\$6,000—\$10,000
<i>Suitable for clients with a net worth under \$1,000,000</i>	<i>Suitable for clients with a net worth over \$1,000,000</i>	<i>Suitable for clients with a businesses, trusts, etc.</i>

**NOTE:**

1. Actual fee is determined through our complexity matrix which will be presented and discussed as part of our financial planning consultation process.

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