

<i>Please see our <a href="#">Planning Agenda</a> for a complete description of the planning process.</i>	<b>Comprehensive Financial Planning Services</b>		
	<b>Basic Tier</b> Flat Fee: <b>\$1,250/qtr</b>	<b>Premium Tier</b> Flat Fee: <b>\$2,500/qtr</b>	<b>Concierge Tier</b> Flat Fee: <b>\$3,750/qtr</b>
<b>Ideal for:</b>	New attendings with negative net worth, starting to save for retirement	New attendings able to save aggressively or established attendings seeking comprehensive financial planning	Established attendings/retirees with more complex financial situations
One-time set-up fee	<b>\$1,000</b>	<b>\$1,500</b>	<b>\$2,000</b>
Ongoing financial planning	✓	✓	✓
Recommendations for customized portfolios for all investment accounts	✓	✓	✓
Annual rebalancing recommendations for all investment accounts	✓	✓	✓
In-house investment management		<b>Up to \$1M</b>	<b>\$1M+</b>
Phone calls and emails on an as-needed basis	✓		
Unlimited meetings and communication		✓	✓
Quarterly reviews and updates to your plan	✓	✓	✓
Additional “quarterbacking” engagements with other professionals (attorney, CPA, insurance, employer)		✓	✓
Personal income tax preparation (\$1000 credit towards preparation with Fox & Co CPAs)			✓

**OTHER SERVICES AVAILABLE:**

**Financial Checkup:** Starting at \$4,000\* One-time assessment of your financial situation to provide recommendations and implementation strategies.

\*50% of fee can be applied to the cost of Comprehensive Planning within 30 days of completion

**Hourly rate:** \$250/hr with a 2-hour minimum. Ideal for limited scope of work for existing clients only