

<i>Please see our Planning Agenda for a complete description of the planning process.</i>	Comprehensive Financial Planning Services		
	Basic Tier Flat Fee: \$1,250/qtr	Premium Tier Flat Fee: \$2,500/qtr	Concierge Tier Flat Fee: \$3,750/qtr
Ideal for:	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	\$1,000	\$1,500	\$2,000
Ongoing financial planning	✓	✓	✓
Recommendations for customized portfolios for all investment accounts	✓	✓	✓
Annual rebalancing recommendations for all investment accounts	✓	✓	✓
In-house investment management		Up to \$1M	\$1M+
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			✓

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