

| Please see our Planning Agenda for a complete description of the planning process. | 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 (\$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