



	Limited Planning Services		Comprehensive Planning Services	
	Skippy Planning Flat Fee: \$625/qtr	Basic Tier Flat Fee: \$1,250/qtr	Premium Tier Flat Fee: \$2,500/qtr	Concierge Tier Flat Fee: \$3,750/qtr
Ideal for:	For Residents and Fellows Only (2-year limit)	New attendings with negative net worth, starting to save for retirement	New attendings able to save aggressively/established attendings seeking comprehensive financial planning	Established attendings/retirees with more complex financial situations
One time set-up fee	\$500	\$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 and rebalancing for portfolios			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				✓
Annual on-site visit with you and your business associates or family members				✓

Please see our [Planning Agenda](#) for a complete description of the planning process.

Financial Checkup – Flat Fee: \$3,000*: One-time assessment of your financial situation to provide recommendations and implementation strategies.

*can be applied to the cost of Comprehensive Planning within 30 days of completion