Services & Fees Matrix

This matrix provides a helpful starting point for matching your financial planning and wealth management needs with the services we offer.

Services	One-Time Retirement Plan "Roadmap for Retirement"	Ongoing Wealth Management
Setting Financial Goals & Priorities	✓	✓
Retirement Lifestyle Planning	✓	✓
Retirement Transition Coaching	Basic	✓
Retirement Income & Spending Plan	✓	✓
When to Claim Social Security or Pension	✓	✓
Advice on Retirement Accounts	✓	✓
Retirement Projections & Stress-Testing	✓	✓
Set Up & Monitor Retirement Income		✓
Net Worth & Cash Flow	✓	✓
Income Tax Planning	Basic	✓
Income Tax Preparation & Filing		Available through McClanahan Tax
Portfolio Analysis & Proposed Changes	Basic	Advanced
Portfolio Management		✓
Tax Sensitive Asset Allocation		✓
Tax Gain/Loss Harvesting		✓
Insurance Needs Analysis	✓	✓
Estate Planning Review	✓	✓
Charitable Strategy Planning		✓
Special Financial Projects	Can be included	Can be included
Checklist of *Initial* Action Steps to Take	✓	Update as needed
24/7 Online Access to Living Plan	30 days, unless retain ongoing	✓
Access to Planner after Initial Planning	30 days, unless retain ongoing	✓
Fees	**$2,000-$4,000, depends on client needs & complexity**	**0.25% Quarterly < $ 1million Negotiable > $1 million**

Wealth Management is typically offered only after initial Retirement Planning. We may consider standalone management engagements on a case-by-case basis.

No investment or income minimums to engage our project-based Retirement Planning services. $300,000 minimum household assets to engage our ongoing Wealth Management services.

For do-it-yourself investors and those with limited concerns, as-needed advice at $200 per hour (2 hour min).

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