

Financial Planning Pricing Sheet

Standalone Financial Plan: Personal finances can be complex and are ever-changing. Therefore, no two plans are ever alike. We price our financial planning in accordance with your specific needs. Our plans begin at \$1,250.

Monthly Retainer: For ongoing service, we charge a monthly retainer fee

- \$49/mo Base – Personal Financial Website
 - o Access to Financial Planning Associate
 - o Online Organizer – connect all your accounts and information for an organized, consolidated view
 - o Financial Workshop – suite of online lessons to see if you're on target to reach your most important goals
 - o Online Vault – safely store your most important documents for quick and easy access
 - o Spending and Budgeting – interactive tool to track and manage your cash flow
 - o Annual Plan Refresh - annual update based on current inputs and progress
- \$99/mo Premier – Includes all of the above as well as:
 - o Personalized Onboarding Assistance – step-by-step live instruction and data entry assistance
 - o On-demand Access to over 80 Financial Reports – net worth, income, expenses, investments, estate, etc.
 - o Ongoing Website Maintenance – fix and repair invalid connections, miscategorizations, other errors
 - o Semi-Annual Plan Refresh – 6-month mile-marker meeting to discuss progress towards goals
- \$199/mo Premier Plus – Includes all of the above as well as:
 - o Access to CERTIFIED FINANCIAL PLANNER – 27 years of experience, and a licensed fiduciary
 - o Full Suite of Financial Planning Tools – a la carte reporting options by request
 - o Access to Interactive Cash Flow Planning – dynamic multi-scenario input forecasting

Discounts: The foundation of any financial plan comes down to *how well your money is invested*. As such, we would like to offer you our fee-based investment management services that can offset the cost of your *Standalone Financial Plan*. Therefore, for every \$100,000 we manage for you, we provide a 10% discount on the cost of your plan. See breakpoints below:

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| - 10% discount at \$100,000 household value | - 60% discount at \$600,000 household value |
| - 20% discount at \$200,000 household value | - 70% discount at \$700,000 household value |
| - 30% discount at \$300,000 household value | - 80% discount at \$800,000 household value |
| - 40% discount at \$400,000 household value | - 90% discount at \$900,000 household value |
| - 50% discount at \$500,000 household value | - Complementary Financial Plan at \$1,000,000 |