

# A Plan for Every Stage

## Which Best Describes You?

	Single, Starting a Family, or a Growing Family	Near or Entering Retirement	Settled Into Retirement
<b>WHAT IT COSTS</b> <small>One Time Fee</small>	<b>\$1,800</b>	<b>\$2,300</b>	<b>\$1,200</b>
<b>WHAT IS INCLUDED</b>			
<b>GUIDANCE</b>			
Goal Setting	✓	✓	✓
Goal Tracking	✓	✓	✓
Budget Creation	✓	✓	
Estate Document Coordination	✓	✓	✓
Financial Organization System <small>Binder or Virtual</small>	✓	✓	✓
6 Month Check-Up	✓	✓	✓
12 Month Check-Up	✓	✓	✓
<b>ANALYSIS</b>			
Emergency Savings	✓	✓	✓
Employee Benefits	✓	✓	
Loans/Debts	✓	✓	
Retirement Savings	✓	✓	✓
Social Security Strategy		✓	
Insurance	✓	✓	
Investment	✓	✓	✓

**Don't need a full comprehensive plan?** Topic specific help is \$275/hour.

# Progress Throughout Life

## WHAT IT COSTS

Assets Under Advisement Annual Fee Schedule	
Up to \$2,000,000	1.00%
\$2,000,001 - \$5,000,000	0.90%
\$5,000,001 +	0.85%

WHAT IS INCLUDED	Up to \$500,000	\$500,001-\$1,000,000	\$1,000,001 +
<b>ORGANIZATION</b>			
Your Personal Financial Website	✓	✓	✓
Goal Setting & Plan Update In Person or Virtual	Every 3 Years	Every 2 Years	Every Year
Ongoing Accountability Partner	✓	✓	✓
Beneficiary Management		✓	✓
CPA & Estate Attorney Coordination		✓	✓
<b>MANAGEMENT</b>			
Cash Flow Guidance	✓	✓	✓
Investment Management	✓	✓	✓
Performance Monitoring	✓	✓	✓
Goal Tracking	✓	✓	✓
Insurance Management	✓	✓	✓
Investment Review In Person or Virtual	Annual	Annual	Annual Separate from Goal Setting & Plan Update Meeting

See account agreements for more information. Fee schedule is as of 1/30/2019 and subject to change.