We are most suited for a person who …

- Is a financial delegator
- Is passionate about their goals
- Wants to follow & implement our advice
- Desires simplicity & peace of mind
- Wants all their financial assets under the watchful eye of a trusted advisory firm
- Values the work we do

	$1,000,001 & more	$500,001 - $1,000,000	$200,001 - $500,000	$200,000 & below
Annual Fee by Tier	1.35% = $0 - $1,000,000 0.50% = $1,000,001 - $2 M 0.40% = $2,000,001 - $3 M 0.30% = $3,000,001 and over	1.35% = $0 - $1,000,000	1.35% = $0 - $1,000,000	1.35% = $0 - $1,000,000
Meetings/Review				
Personal Strategy Meetings	4 times per year	3 times per year	2 times per year	1 time per year
Check-In Contact	2 times per year	2 times per year	1 time per year	1 time per year
Tactical Investment Management	✓	✓	✓	✓
Life & LTC Insurance Review	✓	✓	✓	✓
Estate Document Review	✓	✓	✓	✓
Beneficiary Designation Review ($295 value)	✓	✓	✓	
Year-End Tax Planning ($400 - $995 value)	✓	✓	✓	
Sounding Board for Family & Friends ($200/hour)	✓	✓		
Legacy Video Production ($1,795 value)	✓			
Coordination with Other Advisors ($200/hour)	✓			
With all investments under our Management				
1040 Income Tax Preparation* For you and your dependent children	100% Reduction[1]	50% Reduction[1]	25% Reduction[1]	0% Reduction[1]
Basic Wealth Plan ($2,000)* Update of Basic Wealth Plan ($500)	100% Reduction[1]	50% Reduction[1]	25% Reduction[1]	0% Reduction[1]
Complex Wealth Plan ($7,000)* Update of Complex Wealth Plan ($1,000)	100% Reduction[1]	50% Reduction[1]	25% Reduction[1]	0% Reduction[1]

** Prices listed are valid and accurate based on selected plan and client category. Changes may occur and fees for services beyond initial agreement and plan pricing will be at the firm's standard rates plus out-of-pocket expenses. Payment for services is due at agreement signing, or when tax services are rendered and, in some circumstances, interim billings may be submitted as work progresses and expenses incurred. In some circumstances, a retainer may be required.*

[1]Percentage of fee reductions are applied to fees incurred by the client detailed on any and all service agreements for services to n rendered for financial, investment or tax purposes, at the time of client signing each engagement. Fee reductions may change due to client rating change.

As of 01/01/2019