Client Relationship Options
for Financial Planning Services

Service Level	Description of Services	Frequency	Fee
Product Only/ Investments	**Transactional** Review of account performance Specific advice related to account only	**Meetings as needed** Annual minimum	**No Fee***
Financial Planning Relationship	**Consultative** Includes: • Assessment of current financial status • Comprehensive Financial Profile • All Express Modules are Expanded Plus • Essential Documents Locator • Income Tax Analysis • Estate Analysis • Stock Options • Business Continuation	**Annual meeting (minimum)**	**$2,500-$5,000****

Assets Under Management	**Fee Charged**
$0 - $500K	1.4%
$500,001 - $1MM	1.3%
$1MM - $1.5MM	1.2%
$1,500.001 - $2MM	1.1%
$2,000,001 - $3MM	1.0%
$3MM+	Negotiable

*The advisor fee is an annualized percentage and is deducted on a quarterly basis.

*Commissions may be charged on individual transactions.
**Fees are based on complexity and time requirement.

Note: Although we recommend a comprehensive financial plan for most cases, some services are available a la carte.

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