

SEQUOIA

ADVISORY GROUP

1) MANAGEMENT OF ASSETS FEE SCHEDULE

***Custodian, Platform, Investment and Internal Costs are not included here. Depending on the construction of the portfolio, cost will vary.

	Assets	Advisor Management Fee***
\$10,000	\$99,999	1.25%
\$100,000	\$999,999	1.00%
\$1,000,000	\$1,999,999	0.90%
\$2,000,000	\$3,999,999	0.80%
\$4,000,000	and above	0.70%

2) FINANCIAL PLANNING AND HOURLY WORK FEE SCHEDULE

Financial Planning Consultation.

We generally charge \$2000 for a Financial Plan.
\$250 consultation is absorbed here***

On-Going Financial Planning Consultation and/or Financial Plan.

Hourly rate for specific planning needs/projects.

***Basic retirement plan available for a flat fee.

Cost***	Generally Speaking
\$250	1 Hour/1 Meeting
\$2,000	8 Hours/Multiple Meetings
\$1,000	4 Hours/2 Meetings per year
\$250	1 Hour/Scope of project
\$500	2 Hours/1 Meeting

3) PURCHASE OF A CONTRACT WITH AN INSURANCE COMPANY: COST VARIES BY PRODUCT.

Products like life insurance, disability insurance, annuities or long-term care

Insurance company pays a commission to advisor

ALL FEES ARE DISCUSSED AND AGREED UPON PRIOR TO ENGAGEMENT

***These fees are negotiable for specific client situations and levels of engagement

^\$250,000 AUM
Planning is included