Schedule of Services

Core Services	Comprehensive Services	Advanced Services
		• Wealth conservation planning
		• Charitable giving strategies
		• Trust creation and asset integration
	• Behavioral Investment Counseling®	• Tax-optimized investing and giving
	• Wealth Building Cornerstones®	• Professional business and personal coaching
	• Retirement plan clarification and analysis	• Business Planning:
	• Comprehensive financial plan	○ Business assessment review
	• Retirement needs clarification and analysis	○ Executive compensation options
• Goals and objectives clarification and review	• Income distribution strategies	○ Buy/sell planning
• Custom analysis of risk tolerance	• Comprehensive protection and insurance planning	○ Key employee compensation/ protection
• Net worth analysis	• Estate planning	○ Employee benefits
• Cash flow and budget clarification and review	• Tax planning	○ Retirement plan clarification, analysis, and recommendations
• Asset allocation clarification and review	• Education clarification and planning	
• Portfolio rebalancing	• Document organization	• Plus all Comprehensive Services
• Portfolio performance reporting		
• Tax cost basis reporting	• Plus all Core Services	• Plus all Core Services

Caldara, Wunder & Associates provides financial advice, guidance, tolls and engagement.

We enable others to intentionally pursue their dreams while minimizing the risk of dependency on government and charity.

We serve our clients, our community, our profession, and our country.

Our relationships are nourished by integrity, loyalty, and genuine respect.

Client Communications

	Core	Comprehensive	Advanced
In-person advisor meetings	1	2	3
Educational Updates	3	6	12
Scheduled Events	0	1	2

Assets Under Management	Advisor Fee
Under $250,000	1.25%
$250,001 - $500,000	1.15%
$500,001 - $750,000	1.05%
$750,001 - $1,000,000	.95%
$1,000,001 - $2,000,000	.85%
$2,000,001 +	.75%

Planning Fee	Creating Your Plan	Updating Your Plan
Core Services	$500	$250
Comprehensive Services	$1,000	$500
Advanced Services	$2,000	$1,000

Our holistic approach and planning process assure that all our clients, their families, and their businesses receive tremendous, tangible value from our work. In order to accomplish this, we strive to communicate our value not only through working diligently to help our clients realize their financial goals and dreams, but also through administering fees that are transparent and fair. We welcome any questions, at any time, that you may have in regards to our planning philosophy.