

MILNE FINANCIAL PLANNING

Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”) for more details of Milne Financial Planning’s advisory services and fees, respectively. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees may be negotiable.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Hourly Fee	\$425	As Needed	Financial Planning Services
Subscription Fee	\$0	n/a	
Fixed Fee	\$2,500	One Time at Completion of Review	Financial Planning Services
	\$5,000	\$2,500 due at the beginning of engagement and \$2,500 due at end of engagement	Financial Planning Services
	\$7,500	\$3,750 due at the beginning of engagement and \$3,750 due at end of engagement	Financial Planning Services
Commissions to the Adviser	\$0	n/a	
Performance-based Fee	\$0	n/a	
Ongoing Fee	<u>Ongoing Financial Planning Fee</u> \$5,000 - \$30,000 annually <u>Assets Under Management Fee</u> Maximum of 2%	Quarterly in advance.	Financial Planning Services; and Portfolio Management for individuals and/or small businesses.
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager	\$0	n/a	
Robo-Adviser Fee	\$0	n/a	
Fee Total	Talk with your Adviser about fees and costs applicable to you		

Additional fees and costs to discuss with Milne Financial Planning

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	No	
Commissions	Yes	Schwab
Custodian Fees	Yes	Schwab
Mark-ups	No	
Mutual Fund/ETF Fees and Expenses	Yes	Schwab

Effective 3/22/2024