

# Your 4-Lane Story™ Fee Structure

Complementing your advisors, our services intend to enrich legal, tax & healthy guidance, not substitute for them.



**Your Longevity Story™ & Your Income Tax Story**

Advance: \$2,200+  
\$300 - \$5,000/mo

Depending on scope & complexity

Test Drive: Your Longevity Story™ Mind Map

Imagine transforming your vision of future possibilities into your reality!

**Your Money Management Story & Your Income Tax Story**

See separate schedule

Test Drive: Your Dynamic Wealth Income Plan™

Imagine your goals aligned with your volatility tolerance, income, & tax efficiency.

**Your Income Tax Story**

Advance: \$500  
\$300/hr.

Test Drive: Income Tax Report & Summary of Findings

Imagine if you could decrease your lifetime tax bill & increase your lifetime wealth!

**Your Family Business Story**

Advance: \$3,300+  
\$500 - \$10,000/mo

Depending on scope & complexity

Test Drive: Business Exit Readiness Assessment

Imagine having even more fun growing your business! Then, leave on your terms!

Investment Advisor services offered via myFamilyCFO, Inc., a Registered Investment Advisor  
Patrick T. Bradley | Founder | Manufacturing Owner Transitionist  
715-212-4531 | [patrick@myFamilyCFO.net](mailto:patrick@myFamilyCFO.net)  
PO Box 297, Wausau, WI 54402 | [www.myFamilyCFO.net](http://www.myFamilyCFO.net)



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**The real benefit of Your 4-Lane Story™ is feeling even more excited and even more energized about your future with increased clarity, greater confidence and the expanded capability to impact the events and people with whom you care.**

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