WEALTH MANAGEMENT SERVICES

Financial Planning & Consulting Packages

Essential	Advanced	Premier
Ideal For: Individuals looking to organize their financials and plan for the future- "Accumulator"	Ideal For: Individuals or Families looking to set and monitor financial goals- "Pre-Retirees"	Ideal For: Individuals, families, and/or business owners with complex financial needs- "Distribution & Legacy"
Meetings: Annual Annual Service Hours: 10'	**Meetings: Semi-Annual** Annual Service Hours: 20'	**Meetings: Tri-Annual** Annual Service Hours: Unlimited
✓ Investment Review ✓ Quarterly Newsletter ✓ Retirement Check-up ✓ Goal Monitoring ✓ Behavioral Financial Coaching ✓ Access to Professional Financial Advice ✓ Online Financial Portal	**Tier 1 Plus:** ✓ Net Worth Statement ✓ Retirement Income Planning ✓ Detailed Cash Flow Analysis ✓ Roth Conversion Review ✓ Multiple Goal Analysis ✓ Risk Analysis ✓ Basic Estate Planning	**Tier 2 Plus:** ✓ Wealth Transfer Planning ✓ Stock Option Analysis ✓ Charitable Giving Strategies ✓ Tax Planning Strategies ✓ Collab. With Third Party Professionals (Attorney, CPA, etc.)
Initial Plan/Setup: $1,500+ Ongoing Planning: $500 quarterly or >500k AUM - waived	*Initial Plan/Setup: $3,000 + Ongoing Planning $700 quarterly or >1MM AUM - waived*	*Initial Plan/Setup: $4,500 + Ongoing Planning: $900 quarterly or >2.5MM AUM - waived*

Hourly Planning & Consulting

We are pleased to offer ala carte planning services starting at $300/hour depending on your situation and needs. Hours will be estimated and proposed on a project-by-project basis, prior to the start of any work.

Asset Management Services

Account Value	Annual Advisory Fee	Included Services
$0-250k	1.50%	• Portfolio Review • Investment Selection • Rebalancing • Gain/Loss Harvesting • Time Horizon Analysis • Risk Tolerance • Asset Allocation • Investment Research • Financial Planning*
$250k – $500k	1.35%	
$500,000 – $999,999	1.15%	
$1M – 2.5M	.85%	
2.5M +	Negotiable	

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ChFC®, CIMA®
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