Retirement Planning Services and Fees

Comprehensive Strategic Retirement Planning $1,800 per quarter

- Ideal for individuals in or approaching retirement within 5 years who are interested in investment management and have $500,000 or more in investable assets.
- Five engagements during the year
    - Three meetings
        - First Meeting (January – April). Topics: Cash Flow Management / Tax Planning / Goal Setting
        - Second Meeting (May – August). Topics: Investment Review / Estate Review (Even Year) or Insurance Review (Odd Year)
        - Third Meeting (September – December). Topics: Year End Review (Required Minimum Distributions, Tax Loss Harvesting, Roth Conversions, etc.)
    - Two check-in calls in between meetings.
- Annual tax planning report.
- 24/7 access to Financial Plan via client portal.
- Fees can be paid via investment accounts or credit card.

Strategic Retirement Planning - $750 per quarter

- Ideal for individuals in or approaching retirement within 5 years who are not interested in investment management or are below the $500,000 minimum in investable assets.
- Three engagements during the year.
    - Two meetings
        - First Meeting (January – April). Topics: Cash Flow Management / Tax Planning / Goal Setting / Estate Review (Even Year) or Insurance Review (Odd Year)
        - Second Meeting (September – December). Topics: Year End Review (Required Minimum Distributions, Tax Loss Harvesting, Roth Conversions, etc.)
    - One check-in in between meetings.
- 24/7 access to Financial Plan via client portal.
- Fees are paid via credit card.

Non-Retirement Planning Services and Fees

Comprehensive Financial Vision Planning $1,250 per quarter

- Ideal for individuals in their working years interested in investment management and have $300,000 or more in investable assets.
- Four engagements per year.
  - One meeting
    - One Annual Review (January – April). Topics: Income and Savings Strategy / Tax Planning / Investment Review / Estate Review (Even Year) or Insurance Review (Odd Year) / Goal Setting
  - Three check-in calls each quarter after the Annual Review.
- Annual tax planning report.
- 24/7 access to Financial Plan via client portal.
- Fees can be paid via investment accounts or credit card.

Financial Vision Planning - $500 per quarter first 12 months

- Ideal of individuals in their working years who are not interested in investment management or are below the $300,000 minimum in investable assets.
- Two engagements per year.
  - One meeting.
    - One Annual Review (January – April). Topics: Income and Savings Strategy / Tax Planning / Estate Review (Even Year) or Insurance Review (Odd Year) / Goal Setting
  - One check-in call 6 months after Annual Review.
- 24/7 access to Financial Plan via client portal.
- Fees are paid via credit card.