

Schedule of Financial Planning Fees

Financial planning fees depend on the size and the detail of the requested financial plan and are individually reviewed and agreed upon with the client. The details and fees for each financial plan are outlined in the financial planning agreement. Financial planning fees are paid one half in advance and one half when work is completed, unless otherwise agreed upon with the individual client.

The cost of a financial plan is based on the scope and detail of the work required by you. A financial plan is \$2,500 and includes 10 hours of planning work. A retirement analysis is \$1,500 and includes 6 hours of planning work. If the scope and work of your plan goes beyond 10 hours, we charge \$250 per extra hour.

Annual plan updates generally require about 2 hours of planning work, which costs \$500. Additional hours are billed at a rate of \$250 per hour. We provide free annual updates to clients with invested assets of at least \$500,000 with our firm.

Minimum Financial Planning fees:

Hourly Rates:

CERTIFIED FINANCIAL PLANNER™/Financial Advisor:	\$ 250.00
Financial Para Planner	\$ 125.00
Administrative Assistant	\$ 75.00

Project Rates:

Retirement Analysis	\$ 1,500.00
Financial Plan	\$ 2,500.00

Rates are subject to change based on the scope and detail of the work required by the client.