

Fee Schedule

First meetings are complimentary and serve as a time to understand the relationship between your needs and our solutions without any financial obligation. After your initial consultation with our financial planning team, we will provide you with a planning engagement letter that will define the services we will provide to you and your family. We offer our clients the ability to work with us on a comprehensive or modular basis according to the fee schedule below. We also work with our clients on an hourly basis to provide services ranging from document organization to general financial advising. Below please find our fee schedule that may be used as a general guideline. Our planning fees will vary based on your family's specific needs and situation.

First Year Planning Fee*

Income	Range of Fees
\$0-\$50,000	\$750-\$1,250
\$50,001-\$75,000	\$1,000-\$1,500
\$75,001-\$100,000	\$1,250-\$2,000
\$100,001-\$150,000	\$1,500-\$2,500
\$150,001-\$300,000	\$1,750-\$3,000
\$200,001-\$300,000	\$2,250-\$4,500
\$300,001-\$500,000	\$3,000-\$5,000
\$500,001-\$1,000,000	\$4,500-\$8,500
\$1,000,001 and above	\$6,000-\$12,000

Assets	Range of Fees
\$0-\$250,000	\$750-\$1,250
\$250,001-\$500,000	\$1,000-\$1,500
\$500,001-\$750,000	\$1,250-\$2,000
\$750,001-\$1,000,000	\$1,500-\$2,500
\$1,000,001-\$2,000,000	\$1,750-\$3,000
\$2,000,001-\$4,000,000	\$2,250-\$4,500
\$4,000,001-\$6,000,000	\$4,500-\$8,500
\$6,000,001 and above	\$6,000-\$12,000

*Fee based upon highest qualifying category level.

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