

Financial Planning Areas

INVESTMENT MANAGEMENT	Silver \$2k	Gold \$3k	Platinum \$5k
\$1,250	\$2,000	\$3,000	\$5,000
-	Budget Worksheet	Budget Worksheet	Budget Worksheet
-	Cashflow Planning	Cashflow Planning	Cashflow Planning
-	Risk Assessment	Risk Assessment	Risk Assessment
-	Employer Benefit Review	Employer Benefit Review	Employer Benefit Review
-	-	Education Planning	Education Planning
-	-	Retirement Planning	Retirement Planning
-	-	Investment Planning	Investment Planning
-	-	Dependent Care Planning	Dependent Care Planning
-	-	-	Tax Planning w/your tax professional
-	-	-	Business Retirement Planning
-	-	-	Business succession planning

Account Value	Annual Advisory Fee
\$0 - \$99,999	1.00%
\$100,000 - \$249,999	0.90%
\$250,000 - \$499,999	0.80%
\$500,000 - \$749,999	0.70%
\$750,000 - \$1,499,999	0.60%
\$1,500,000 and Above	0.50%