

Fee Structure Overview

A concise summary of advisory, consulting, and hourly financial planning fees. Fees are discussed and agreed upon before entering into a formal client agreement.

Investment Management / AUM Fees

Individually Managed Accounts

Fees for individually managed accounts are calculated on a tiered, blended basis. Each fee rate applies only to the portion of assets within the corresponding tier.

Account Size	Annual Fee
Amounts up to \$500,000	1.00%
\$500,001 to \$2,000,000	0.85%
Amounts over \$2,000,000	0.65%

Advisory fees are calculated as a percentage of assets under management.

Fixed-Fee Consulting

General Consulting Fees

Typical annual fee: \$7,500 to \$10,000

General consulting is offered as an annual relationship and billed quarterly.

Fixed fees are determined in advance based on the agreed scope, project complexity, and information available at the time of engagement.

Fees are generally informed by an estimated hourly rate of \$300, but charged on a fixed-fee basis.

Hourly Planning

Hourly Financial Planning Fees

Hourly rate: \$300 per hour

Hourly financial planning services are used when the scope is better suited to time-based billing.

An estimate of total hours is provided at the outset of the engagement.

Hourly fees are discussed and agreed upon before entering into a formal client agreement.

Fee terms are finalized in the applicable client agreement before services begin.