



PRICING OPTIONS

Fee-only financial advisor
No commissions

✔ Assets Under Management Annual Rate

Under \$1,000,000.....	0.95%
\$1,000,000 to \$2,000,000.....	0.75%
Greater than \$2,000,000.....	Lower Rates Available

Example: \$50,000 x 0.95% = \$475/year

In-depth Financial Planning Included

✔ Standalone Financial Plan

\$1,000 to \$3,000

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