



PROJECT FEE SCHEDULE

FEE ONLY | NO COMMISSIONS

Financial Plan Design

- **Custom financial plan design with clear action items**
 - Detailed analysis of focus areas listed below
 - Includes access to financial planning model
- **3+ Meetings**
 - Data Gathering, Plan Delivery, Implementation Follow-up
- **\$2,000 - \$5,000, depending on complexity**
 - 50% due upfront, 50% due upon plan delivery

Financial Plan Focus Areas

- Goal Identification
- Net Worth Analysis
- Cash Flow/Debt Management
- Employee Benefits
- Insurance Review
- Tax Planning
- Estate Planning
- Retirement Projections
- Investments
- Education Planning
- Charitable Giving
- Deferred/Equity Compensation
- Distribution Planning
- Legacy Planning

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PROJECT FEE SCHEDULE

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Financial Plan QC Review

- **Quality Control Review of your financial plan with action items**
 - High level analysis of select focus areas listed below
 - Includes access to financial planning model
- **2 Meetings**
 - Data Gathering and Plan Delivery
- **\$1,000 - \$2,000, depending on complexity**
 - 50% due upfront, 50% due upon plan delivery

QC Review Focus Areas

- Goal Identification
- Net Worth Analysis
- Cash Flow/Debt Management
- Employee Benefits
- Insurance Review
- Tax Planning
- Estate Planning
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