

Financial Planning Pricing Matrix

	2 Points	4 points	6 points	8 points	Total Points
Gross Estate (All assets owned, includes life insurance)	< \$1,500,000	\$1,500,000 - \$3,000,000	\$3,000,000 - \$5,000,000	\$5,000,000 +	
Household Income (GROSS)	< \$100,000	\$100,000-\$200,000	\$200,000 - \$400,000	\$400,000+	
Investable Assets	< \$500,000	\$500,000 - \$1,000,000	\$1,000,000 -\$3,000,000	\$3,000,000 +	
Source of Income	W-2 only	Social Security 1099 Income Multi-source	Schedule C Subchapter S	Real Estate Stock Options Deferred Compensation Foreign Income Trust Income	
Type of Assets	Cash accounts only	Mutual Funds Exchange Traded Funds	Individual Securities Asset Management Accounts	Investment Real estate Limited Partnership Illiquid Assets Charitable Trusts REIT, LLC, FLP	
Ownership	Individual JT/WROS	Tenant's in common community property UGMA/UTMA	Trusts	Business Entity	
Family status	Single	Married	Divorced Re-Married	Domestic partners Non-US Citizen	
Years to Goal	10+	6-9 Years	4-5 Years	1-3 Years	
Special Circumstances	Child support Maintenance	Early Retirement. Inheritance < \$100k Social Security Disability Supplemental Security Income	Death of Spouse pre or post nuptial agreement	Inheritance > \$100k Buyouts Lottery terminal illness Special needs Trust	
TOTAL					

	Pricing Annual	Pricing Monthly	Plan Level
0-19	\$2,100.00	\$175.00	Base
20- 29	\$3,000.00	\$250.00	Snow Line
30-39	\$4,200.00	\$350.00	Summit
40+	1.5% of Gross Income	0.125% of Gross Income	Mount Everest

Snow Line (20-29 points)

6 step planning process
2 one-hour meetings per year
Your own personal financial website
Personal financial planning only
Regular updating of your plan
Cash Flow & Debt Management
Employer benefits review
Retirement and Education planning
Insurance review
Investment Review

This plan is best for:

- Relatively new in working with financial planning
- Been in your career 10+ years
- Has retirement savings and/or paying off student debt
- Want to better understand your finances, cash flow, credit, and benefits
- Starting or have a family

\$3000 (\$250 per month)

Summit (30-39 points)

6 step planning process
2-3 meeting per year
Your own personal financial website
Personal financial planning only
Regular updating of your plan
Cash Flow & Debt Management
Employer Benefits review
In-depth Retirement & Education Planning
In-depth Insurance Review
In-depth Investment Review
In-depth Estate Planning
In-depth Charitable Planning
In-Depth Tax Planning
In-depth Social Security Planning

This plan is best for:

- People with some financial planning experience, and more assets
- Been in your career 20+ years
- Thinking about saving for college
- Looking to invest outside of 401k plan
- Beginning to think about what retirement looks like
- Wondering how to minimize taxes
- Thinking about estate planning and charitable giving

\$4200 (\$350 per month)

Mount Everest (40+ points)

6 step planning process
2-4 meeting per year
Your own personal financial website
Regular updating of your plan
Cash Flow & Debt management
Employer benefits review
In-depth Retirement & Education Planning and cash flow
In-depth Insurance Review
In-depth Investment Review
In-depth Estate Planning
In-depth Charitable Planning
In-Depth Tax Planning
In-depth Social Security Planning
Trust planning
Stock options and RSU's
Investment Policy Statement

This plan is best for:

- Typically, more than \$5,000,000 in investable assets
- Been in your career 25+ years
- Paying off long term debt
- Considering the sale of a business
- Wondering when and how to retire
- Wondering how to minimize taxes now and in retirement
- Thinking about estate planning and charitable giving

1.50% of Annual Income

Base (0-19 points)

3 Step Planning Process
1–2-hour meetings/year
Your own personal financial website
Personal Financial Planning Only
Annual Financial updating of your plan
Cash Flow + Debt Management
Employer Benefits review
Basic Insurance Review
Basic Investment Review

The Plan is best for:

Beginners new to working with a financial planner
New in your career
Just starting a retirement savings and/or paying off student debt
Want to better understand your finances, cash flow, credit and benefits
Starting a family

\$2100 (\$175 per month)