

PLANPREP FEE SCHEDULE



effective February 12, 2020

Service	Fee *	Description
Plan Preparation	\$850+	<ul style="list-style-type: none"> • Analysis and entry of data and assumptions • Written follow up to clarify data and strategies • Preparation of customized, focused reports (Wealth Plan) • Either a personalized summary with an objective action plan, a PowerPoint presentation, or a detail of the baseline assumptions • Communications by phone over 30 minutes per engagement may be billed at our highest hourly rate
	or a Quote	
	or \$100 to \$200 per hour	
Total Asset Values of \$3 million or more	Add \$150 to \$850 for each additional \$1,000,000	Round the value down to the nearest million. <i>Example:</i> Additional fee for total assets of \$4.7 million is calculated as follows: $\$850 + (2 \times \$150) = \$850 + \$300 = \$1,150$
Business Planning	Additional fee may apply	There may be an additional charge on top of the plan preparation fee, but any extra amount will be included as part of a quoted fee.
Case Consultations	\$100 to \$200 per hour	Want to discuss a particular case or need advice aside from plan preparation? Burt can help you analyze cases of virtually any size or complexity, or coach you on introducing planning to existing clients or approaching prospects as well as delivering a plan. This is done by phone and/or online.
Customizable Fact Finders & Forms	\$1,500	Receive a zip file with all of our fact finders, forms, checklists, templates for an eMoney report and our executive summary, a sample meeting agenda, and more.
Virtual Meetings, Coaching, and Training	\$500 per hour	PlanPrep can help you uncover more opportunities with your prospects, and present reports and recommendations virtually.
Onsite Meetings, Coaching, and Training	\$5,000 per day plus expenses	PlanPrep can help you uncover more opportunities with your prospects, and present reports and recommendations in person. Travel and related expenses are billed at half this rate. A \$2,500 deposit is required for travel expenses.

* Discounts are available for coaching and training engagements initiated at conferences.

Burt Williamson, MBA, CFP® ~ 650-730-6175 ~ bw@PlanPrep.com
 4 Spruce Street, Riverside, CT 06878 ~ CA Insurance License # 0D33315
 PlanPrep LLC - A Registered Investment Adviser ~ CRD #139300

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Public Speaking	\$7,500 per day on site plus expenses	Burt Williamson is available to present by phone or at conferences, regional meetings and events. Presentations are designed to empower attendees to: <ul style="list-style-type: none">• Do more business in less time• Use effective discovery methods and presentation techniques• Approach higher net worth individuals and business owners with confidence• Review tax returns and legal documents effectively• Make more life and long-term care insurance sales

Be sure to have all planning materials gathered before submitting to PlanPrep. Plan completion is fifteen (15) business days from receipt of all planning materials. The time frame is usually much shorter.

Planning fees are deemed earned when you initiate PlanPrep for each request and are billed through PayPal. You may request, or we may provide, a fee quote after we have reviewed all of the pertinent documents.

Hourly billing is done in 15 minute increments with a one hour minimum.

It is the advisor's responsibility to review all reports within ten (10) business days of delivery from PlanPrep. Additional fees may apply for changes, updates or corrections after the 10 business days have passed for changes you request that exceeds 30 minutes.

Fees are invoiced through PayPal or by email. Payment is accepted through PayPal, advisor's system for ACH payments, Zelle, overnight check, or credit card.

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