



PLAN FOR IT FINANCIAL

CLARITY TO DECIDE • CONFIDENCE TO ACT

Table of Fees for Services

Carefully read Items 4 & 5 of Form ADV Part 2A for more details on Plan For It Financial, LLC's advisory services and fees. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees are negotiable.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Service(s)
Assets Under Management Fee	\$0	N/A	N/A
Hourly Fee	\$350/hr.	Half of the fee will be collected in advance with the remainder due upon completion of the services	Project based financial planning services
Subscription Fee	\$0	N/A	N/A
Fixed Fee	\$3,500 - \$7,500	Half of the fee will be collected in advance with the remainder due upon completion of the services	Ongoing Financial Planning Services
	\$400 - \$700	Monthly in arrears	Ongoing Financial Planning Services
	\$3,500 - \$7,500.	Half of the fee be collected in advance with the remainder due upon completion of the services	Project-Based Financial Planning Services
Commissions to the Adviser	\$0	N/A	N/A
Performance-based Fee	\$0	N/A	N/A
Other	N/A	N/A	N/A
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager Fee	\$0	N/A	N/A
Robo-Adviser Fee	\$0	N/A	N/A
Fee Total	Talk with your Adviser about fees and costs applicable to YOU		

Additional fees and costs to discuss with your Adviser:

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	No	N/A
Commissions	No	N/A
Custodian Fees	No	N/A
Mark-Ups	No	N/A
Mutual Fund / ETF Fees & Expenses	No	N/A

Effective date: January 15, 2026