

HARRIS FINANCIAL *Consulting* PLLC

PERSONAL INVESTMENT ACCOUNTS

Self-Directed Account

- Fee-based pricing
- No account minimums
- non-discretionary account/client initiates all transactions
- Transaction (custodial, broker, etc.) fees may apply
- Flat fees on Financial Planning and Consulting services

New
Investor

Advisory Account

- Asset-based pricing
- \$50,000 account minimum recommended
- Flat fees on Financial Planning and Consulting services
- Advisor-managed portfolio/ client approves transactions
- Select no load, no fee mutual funds available
- stocks, bonds, ETFs, CDs, and Select fractional shares available

Wealth
Building

Managed Account

- Asset-based pricing
- \$250,000 account minimum recommended
- Flat fees on Financial Planning and Consulting services
- Discretionary account managed by dedicated money managers
- Direct ownership of underlying portfolio securities
- Expanded range of assets and strategies

Wealth
Management

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