



Pricing Schedule-Effective 1/1/2026

Financial Advising & Management Services

Financial Advisory Services

-Initial 30- minute consultation-\$59.99

-Basic Advisory/Hourly rate \$149.99 per session

- Client Discovery & On-boarding
- Goal setting
- Ala Carte planning-choose *ONE* focus
 - Retirement Planning
 - College Funding
 - Debt Reduction & Elimination
 - Business Planning & Funding
 - Estate Planning

-Premium Advisory-Two 1-hour appointments monthly (\$174.99 monthly)

- Client Discovery & On-boarding
- Goal setting
- Basic financial plan (includes two focuses)
- Quarterly client review (1 hours)

-Platinum Advisory-Three 1-hour appointments monthly (\$299.99 monthly)

- Client Discovery & On-boarding
- Goal setting
- Comprehensive plan (includes all five focuses and specialty focuses)
- Quarterly client review and plan update (2 hours)
- Bookkeeping service provided by Quickbooks (if applicable)

-Money Management services are 2% of AUM-minimum \$25,000



Business Formation and Planning Services

Corporate Filing

(Filing fee-\$150.00 + State Fees-amount per state varies)

- State LLC, Corporation electronic filing
- EIN acquisition
- Corporate bylaws or Operating Agreement template
- Assistance with obtaining DUNS number

Estate Formation and Planning Services

-Comprehensive Estate Planning-\$1695.00

- Revocable Living Trust with unlimited revisions
- Pour-over will
- Durable Power of Attorney's (Financial & Health)
- Advance Health Directives
- Complimentary Comprehensive Financial Planning Services

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