

COMPREHENSIVE PERSONAL FINANCIAL PLANNING Fee Schedule

FINANCIAL PLANNING COMPONENT:

YEAR 1	2.0% of Earned Income
YEAR 2	1.0% of Earned Income
YEAR 3 and beyond	0.5% of Earned Income

plus: +

INVESTMENT SUPERVISION COMPONENT:

Investment Assets of:

\$0 - \$1,000,000	0.75% of Investment Assets, plus
\$1,000,001 - \$2,000,000	0.50% of Investment Assets, plus
\$2,000,001 +	0.40% of Investment Assets

Minimum fee is \$10,000 per year. Fees may be negotiated based upon individual client circumstances.