



QUICK START / SECOND OPINION

(60-90 minute session, face-to-face or online, Flat Fee, \$745)

INVESTMENT MANAGEMENT

(Simple, low fees with no minimum balance required)

(1.25% for first \$1MM, 0.95% for balances above the first \$1MM)

COMPREHENSIVE FINANCIAL PLANNING

(All Included, 360-degree approach to your financial independence)

(Variable Fees, Complexity Driven, \$250/hour)
