

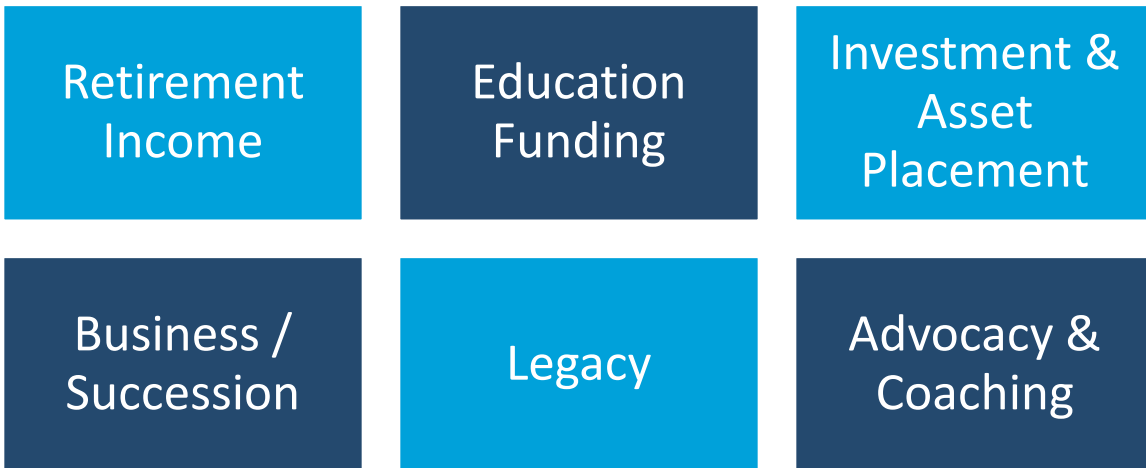


2021 Financial Planning Fees

Financial Planning Only Starting At

Per Planning Module.....\$60.00 / Month*

Annual Service Plans available from \$500.00 / year



Financial planning fees include up to 3 in-person or online meetings, unlimited telephone and email access to your advisor for questions and advice for one year. Financial planning engagements must be renewed annually to maintain access to our planning software and intellectual capital. Fees will be different for clients enrolled in asset management service.



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