



Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”), as these sections of the Brochure contain important details about [insert firm name] advisory services and fees. Fees [may be/are not] negotiable. The fees below will only apply to you when you request the services listed.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	N/A	N/A	N/A
Hourly Fee	\$250	Upon Completion	Financial Planning
Subscription Fee	\$100 - \$500	Monthly	Financial Planning
Fixed Fee	\$1,200 to \$10,000	50% Engagement, Balance at Delivery	Financial Planning
Commissions to the Adviser	N/A	N/A	N/A
Performance-based Fee	N/A	N/A	N/A
Other (On-boarding Fee)	\$1,000 to \$10,000	N/A	Financial Planning
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager	N/A	N/A	N/A
Robo-Adviser Fee	N/A	N/A	N/A
Talk with your Adviser about fees and costs applicable to you			

Additional fees and costs to discuss with your Adviser

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	N/A	N/A
Commissions	N/A	N/A
Custodian Fees	N/A	N/A
Mark-ups	N/A	N/A
Mutual Fund/ETF Fees and Expenses	N/A	N/A