FINANCIAL PLANNING FEE SCHEDULE

Reach One Teach One
FINANCIAL

Our Approach

We provide financial planning services to individuals, families and business owners. We are committed to serving our clients as unique partners who need personalized solutions and well thought out strategies to empower them to make their own decisions. Above all else, we value the relationships and trust that we build.

Financial Planning Services

We offer our clients a holistic financial planning & monitoring approach to help them maintain overall financial health and accomplish multiple (and competing) financial goals. Whether it's a more comprehensive financial plan or a specific planning need, our services always align with your current priorities, including ongoing review and monitoring.

Portfolio Management Services

OPIONAL: We understand your many investment needs and utilize timely and appropriate wealth management strategies to pursue both short and long-term goals. As a fiduciary, we also provide expert, objective and independent advice, putting your needs and best interests first.

Financial Planning Packages

Standard "Get organized and set a course for your financial future"	**Advanced** "A comprehensive approach to fully evaluate and prioritize your finances"	**Premier** "Take complete control of your financials and build your legacy"
Meetings: Annual	Meetings: Semi-Annual	Meetings: Quarterly
✓ Investment Review ✓ Retirement Planning ✓ Beneficiary Review ✓ Behavioral Financial Coaching ✓ Goals Tracking ✓ Net Worth Statement ✓ Charitable Giving ✓ Financial Monitoring ✓ Online Experience ✓ Access to CFP® Professional	**Essential Plan Plus:** ✓ Cash Flow Planning ✓ "What if" Scenarios ✓ Multiple Goal Analysis ✓ Education Planning ✓ Risk and Insurance Analysis ✓ Roth Conversion Review ✓ Social Security and Medicare Analysis	**Advanced Plan Plus:** ✓ Estate Planning ✓ Wealth Transfer Scenarios ✓ Family Financial Education ✓ Equity Compensation Analysis ✓ Business Planning ✓ Income Tax Planning
Initial Plan: $1,997 (4-6 hrs)* *Ongoing Planning: $197/month*	*Initial Plan: $2,997 (7-9 hrs*)* *Ongoing Planning: $297/month*	*Initial Plan: $4,997 (13-15 hrs*)* *Ongoing Planning: $497/month*

* If your plan requires more time than expected, you will be billed accordingly at $350/hr.

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OPTIONAL: Portfolio Management Services

- Portfolio Review
- Investment Selection
- Rebalancing
- Gain/Loss Harvesting
- Time Horizon Analysis
- Risk Tolerance
- Asset Allocation
- Investment Research

Non-Financial Planning Clients: Portfolio Management Only

Account Value	% AUM Fee
$0 – $999,999	1.25%
$1,000,000 - $ 2,999,999	1.00%
$3,000,000 +	0.80%

Financial Planning Clients:

Account Value	% AUM Fee with Discount
$0 – $999,999	1.00%
$1,000,000 - $ 2,999,999	0.80%
$3,000,000 +	0.75%

Reach One Teach One Financial
888-877-1138
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