Financial Planning Fee Schedule

Already managing your own portfolio — or working with another advisor — but want access to **institutional-grade financial planning?** We offer flat-fee planning engagements built around your specific situation. You receive a comprehensive plan; you execute it on your own terms.

The fee schedule below outlines our standalone planning engagement fees. Fees are quoted upfront based on scope and complexity.

Comprehensive Financial Plan

A full financial plan covering retirement projections, tax strategy, insurance review, estate planning, and portfolio allocation recommendations. Delivered as an actionable written report with a walkthrough meeting and 90 days of follow-up support.

Targeted Planning Module

A focused engagement around a single planning area — tax optimization, Social Security timing, Roth conversion analysis, real estate exit strategy, or executive compensation review. Includes scenario modeling, a written deliverable, and a strategy session.

Portfolio Review & Asset Allocation

A portfolio review and asset allocation analysis is provided complimentary to all prospective and current clients.

Service	One-Time Fee
Basic Financial Plan	$3,000
Comprehensive Financial Plan	$5,000+
Portfolio Review & Asset Allocation	**Complimentary**
Hourly — Custom Engagements	$375 / hr

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