YOUR LOGO

Fee Schedule

{{Advisor/Firm Name}} offers full transparency regarding the fees our clients pay. By providing Comprehensive Goals-Driven Planning and Investment Management Solutions for our clients, coupled with ongoing monitoring and a concierge level of services, we believe the compensation we receive aligns directly with our industry and our service model.

The following fee schedule separates our services between investment management and financial planning.

{{Advisor/Firm Name}} Fee Schedule

Each client relationship and fee schedule can vary depending on a variety of factors. Please let us know if you have questions relevant to your individual situation.

Assets Under Management	Annual Fee
$250,000 - $750,000	X.XX%
$750,001 - $1,250,000	X.XX%
$1,250,001 - $2,500,000	X.XX%
$2,500,001 - $5,000,000	X.XX%
$5,000,001 - $10,000,000	X.XX%
$10,000,001 and above	X.XX%

Firm Steet Address
City, State, Zip Code
Phone:
Email:
Web Address