



Paul M. Goyette, CFP[®], CFS[®], ChSNC[®]
Michelle L. Wheeler, ChFC[®], ChSNC[®]

Investment Management Services

Our investment management services are primarily fee based. The fee is percentage-based on the balance of the account.

POTENTIAL BENEFITS

A fee-based practice strives to put us on the same “side” of the field as you and keeps us focused on helping you pursue your financial goals by:

- Striving to provide you with objective advice and reducing potential conflicts of interest
- Calculating advisory fees as a percentage of the account value, aligning the advisor’s fee-based compensation with the client’s portfolio performance.
- Increasing transparency which aims to increase your confidence in the advisory process

<i>Account Value</i>			<i>Annual Advisory Fee</i>
<i>First</i>	Minimum	\$249,999.99	1.75%
<i>Next</i>	\$250,000.00	\$499,999.99	1.50%
<i>Next</i>	\$500,000.00	\$999,999.99	1.25%
<i>Next</i>	\$1,000,000.00	\$1,999,999.99	1.00%
<i>Next</i>	\$2,000,000.00	\$2,999,999.99	.90%
<i>Next</i>	\$3,000,000.00	\$4,999,999.99	.80%
<i>Next</i>	\$5,000,000.00+		Negotiable

For assets managed at LPL Financial

402 Amherst Street • Unit 101 • Nashua, NH 03063
(603) 689-7162 • pgoyette@northeastplanning.com • mwheeler@northeastplanning.com
For more information on the practice, please visit www.financialplanningmatters.com.