Paul M. Goyette, CFP®, AIF®, CEP®, 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

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

For assets managed at LPL Financial

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For more information on the practice, please visit www.financialplanningmatters.com.