NE NPA

Paul M. Goyette, CFP®, AIF®, CEP®, CFS®, ChSNC®
Michelle L. Wheeler, ChFC®, ChSNC®

Financial Planning Fee Structure

All client relationships start with a Financial plan, which can be basic or complex, depending on your personal situation, goals and objectives. Our planning services are billed based on an hourly rate. Charges vary based on the complexity and extent of the plan.

We provide objective planning and management services on a fee-basis. Our independence provides us objectivity. We generate none of the financial products that we may recommend, therefore, we have no quotas to meet, so our advice is based solely on what we feel may help you work towards your financial objectives.

We assess our fee based on information collected in an initial, no-cost compatibility interview with you. During that meeting, we evaluate your planning needs by reviewing your personal and financial information to determine the scope and range of the plan. After reviewing your needs with our team, we mail you an engagement letter that clearly defines the scope of planning and analysis we can provide. The engagement letter includes an estimate of our planning fee.

On the reverse side of this form is a list of financial planning categories which can be provided. A comprehensive plan will include all modules of the Financial Planning Level unless a specific module does not apply to your situation.

43 Constitution Drive • Bedford, NH 03110
(603) 471-0900 • Paul - Ext. 202 • Michelle - Ext. 203
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For more information on the practice, please visit www.financialplanningmatters.com.

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Financial Planning Fee Structure

	Financial Planning Level	*Wealth Advisory Level*	*Private Client Group Level*
Cash Flow	•	•	•
Net Worth	•	•	•
Survivorship	•	•	•
Disability	•	•	•
Long Term Care	•	•	•
Retirement / Pension Maximization Analysis	•	•	•
Asset Allocation	•	•	•
Education	•	•	•
Accumulation	•	•	•
Estate Plan		•	•
Investment Analysis		•	•
Investment Policy Statement		•	•
Investment Distribution Strategies		•	•
Employee Benefit Analysis		•	•
Life Insurance Policy Analysis		•	•
Elder Care / Medicaid Planning			•
Charitable Giving			•
Special Needs Analysis			•
Comprehensive Financial Plan	$1,500	$2,500	Per Quote
Annual Retainer Fee		$1,200	Per Quote

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