

Financial Planning and Portfolio Management Fee Schedule

Net Worth Amount	Financial Planning Services			
	Basic \$10-\$100K	Intermediate \$100-\$500K	Advanced \$500-\$1,000K	Comprehensive \$1,000,000 +
Budgeting and Cash Flow Analysis	X	X	X	X
Debt Payoff Plan (if any existing debt)	X	X	X	X
Insurance/Risk Management Planning	X	X	X	X
Investment Portfolio Review	X	X	X	X
Account Aggregation	X	X	X	X
Access to Online Financial Plan	X	X	X	X
Individual Consultation as Needed		X	X	X
Income Tax Planning		X	X	X
Retirement Income & Distribution Planning			X	X
Social Security Analysis			X	X
Semimonthly Kiplinger Tax Letter			X	X
Estate Planning				X
Professional Referrals as Needed				X
Additional Services available as needed**				
Executive Compensation				
Deferred Compensation				X
Stock Options				X
Concentrated Equity Positions				X
Business Planning				
Ownership/Control Transfer				X
Key Employee Retention				X
Employee Benefits				X
Annual Financial Planning Subscription Billed Monthly	\$ 900.00	\$ 1,800.00	\$ 2,400.00	\$ 3,000.00

**Billed at \$150/Hour

Glen Thiessen, CFP®, CLU, ChFC, RHU, REBC, CASL

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Investment Management Service	
Annualized Advisory Asset Management Fee (advisor only*):	
\$1,000,000 +	0.50%
\$500,000 - \$1,000,000	0.75%
\$100,000 - \$500,000	1%
\$10,000 - \$100,000	1.25%
*Additional Platform Fees may apply.	
See Investment Proposal for Details.	

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