

# WHITMAN FINANCIAL SERVICES, LLC

## Table of Fees for Financial Planning Services

Carefully read Items 4 and 5 of **Form ADV Part 2A** ("Brochure") for more details of **WHITMAN FINANCIAL SERVICES, LLC's** advisory services and fees, respectively. Fees below are charged when clients request the services listed.

Fees below may not apply to all clients. Fees are not negotiable.

A complete explanation of fees and services can be found in

**WHITMAN FINANCIAL SERVICES, LLC's Form ADV Part 2A.**

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	0	NA	NA
Hourly Fee	\$250 or \$350 <sup>1</sup>	Hourly	Financial Planning
Subscription Fee	0	NA	NA
Fixed Fee	\$3,500 to \$15,000	50% in advance; remainder within 4 months of first meeting or upon project completion	Financial Planning
Commissions to the Adviser	0	NA	NA
Performance-based Fee	0	NA	NA
Other Fee	\$200	One Time	Data collection and assessment
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager	0	NA	NA
Robo-Adviser Fee	0	NA	NA
<b>Fee Total</b>	<b>Talk with your Adviser about fees and costs applicable to you</b>		

<sup>1</sup> Based on Associate or Senior planner rate

### Additional fees and costs to discuss with your Adviser

Also, see Table of Fees for LPL Financial Investment Advisory Services

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	LPL Financial & Firm IARs
Commissions	Yes	LPL Financial & Firm IARs
Custodian Fees	Yes	LPL Financial
Mark-ups	Yes	LPL Financial & Firm IARs
Mutual Fund/ETF Fees and Expenses	Yes	LPL Financial & Firm IARs



Effective January 1, 2021