PRICE PLANNING

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NEW CLIENT FEE CALCULATION

Sam & Sarah Sample
January 6, 2023

Base Fee[1]	$	6,200
Less Services Not Chosen:		
Cash Flow & Retirement Planning		-
Investment Advice		-
Tax Planning		-
Tax Preparation		(800)
Insurance Needs Analysis		-
Education Funding & Estate Planning		-
Net Fee	**$**	**5,400**

Fee Schedule:

Amount due upon signing agreement (25%)	$	1,350
Amount to be invoiced in May, 2023 (25%)		1,350
Amount to be invoiced in August, 2023 (25%)		1,350
Amount to be invoiced in November, 2023 (25%)		1,350
	$	**5,400**

[1] Client, working spouse and two children; Financial Life Cycle Stage = Early Accumulation