

NEW CLIENT FEE CALCULATIONSam & Sarah Sample
January 23, 2026

Base Fee ¹	\$ 6,600
Less Services Not Chosen:	
Cash Flow & Retirement Planning	-
Investment Advice	-
Tax Planning	-
Tax Preparation	(600)
Insurance Needs Analysis	-
Education Funding & Estate Planning	-
Net Fee	<u>\$ 6,000</u>
Amount to be invoiced in February, May, August & November of 2026	<u>\$ 1,500</u>

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