FIREBRAND
WEALTH MANAGEMENT

SUMMARY OF FEES & SERVICES

$750,000

ASSETS UNDER MANAGEMENT

CLIENTS TYPICALLY WITH

MEDIUM COMPLEXITY

INCLUDING

- Retirement in 15+ years
- Savings strategies
- Tax planning
- RSUs/Stock Awards, ESPP
- Retirement planning
- Education planning

1.00% of Assets
($750,000 to $999,999)

$1,000,000

ASSETS UNDER MANAGEMENT

CLIENTS TYPICALLY WITH

HIGH COMPLEXITY

INCLUDING

- Retirement in <10 years
- Multiple stock plans (RSUs, ESPP and ISOs or NSOs)
- Complex tax and estate needs
- Retirement income planning
- Cross-border planning
- Multigenerational planning

0.90% of Assets
($1,000,000 to $2,499,999)

$2,500,000

ASSETS UNDER MANAGEMENT

CLIENTS TYPICALLY WITH

HIGHEST COMPLEXITY

INCLUDING

- Retirement in <10 years
- Upcoming liquidity events
- Complex tax and estate needs
- Family trusts and businesses
- Retirement income planning
- Cross-border planning
- Multigenerational planning

0.80% of Assets
($2,500,000 to $4,999,999+)

FIREBRAND
WEALTH MANAGEMENT

FINANCIAL PLANNING & INVESTMENT MANAGEMENT

SERVICES	$750,000	$1,000,000+	$2,500,000+
INVESTMENT MANAGEMENT	• Goal-based asset allocation • Sustainable investing • Regular rebalancing • Tax-loss & gain harvesting	• Income strategies • Cash management • Option overlay strategies • Concentrated stock mgt	
PLANNING SESSIONS* *PLAN DEVELOPMENT & REVIEW, RETIREMENT PROJECTIONS, GOAL-SETTING AND TRACKING*	TWO	THREE	FOUR
TAX PLANNING & CROSS-BORDER PLANNING	• Q4 Tax planning • Tax return review	• Q4 Tax planning • Tax return review • Coordination with CPA	• Ongoing tax planning • Tax harvesting (x1-4) • Tax return review
EQUITY COMPENSATION *RSUs, ISOs, NSOs*	• Annual review • Trade strategy (x1-2)	• Regular review • Trade strategy (x4 or as needed)	• Includes prior tier benefits • Ongoing tax tracking of RSUs and/or options
PROTECTION *INSURANCE & ESTATE*	• Benefits review (x1) • Estate plan review (x1) • Insurance reviews	• Includes prior tier benefits • Attorney meetings (x1-2)	• Includes prior tier benefits • Multiple attorney meetings • Complex insurance strategies

***All clients are offered four planning sessions in year-one, and we expect to have regular check-ins between planning sessions.**