FIREBRAND

WEALTH MANAGEMENT

FEES IF UNDER MINIMUM

$7,500 SINGLES
$8,500 COUPLES

BEST SUITED FOR

MEDIUM COMPLEXITY

INCLUDING

- Retirement in 15+ years
- Savings strategies
- Tax planning
- Restricted Stock Units
- Stock Options (ISO, NSO)
- Retirement planning
- Education planning

$1,875 SINGLES
$2,125 COUPLES
(Billed Quarterly*)

$10,000 SINGLES
$12,000 COUPLES

BEST SUITED FOR

HIGHER COMPLEXITY

INCLUDING

- Retirement in <15 years
- Restricted Stock Units
- Stock Options (ISO, NSO)
- Complex tax and estate needs
- Family trusts and businesses
- Retirement income planning
- Cross-border planning
- Multigenerational planning

$2,500 SINGLES
$3,000 COUPLES
(Billed Quarterly*)

*Fees based on rate of $400/hour

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.**