



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*)



FINANCIAL PLANNING & INVESTMENT MANAGEMENT

SERVICES	\$750,000	\$1,000,000+	\$2,500,000+
INVESTMENT MANAGEMENT	<ul style="list-style-type: none"> • Goal-based asset allocation • Sustainable investing • Regular rebalancing • Tax-loss & gain harvesting 		<ul style="list-style-type: none"> • Income strategies • Cash management • Option overlay strategies • Concentrated stock mgt
PLANNING SESSIONS* <i>PLAN DEVELOPMENT & REVIEW, RETIREMENT PROJECTIONS, GOAL-SETTING AND TRACKING</i>	TWO	THREE	FOUR
TAX PLANNING & CROSS-BORDER PLANNING	<ul style="list-style-type: none"> • Q4 Tax planning • Tax return review 	<ul style="list-style-type: none"> • Q4 Tax planning • Tax return review • Coordination with CPA 	<ul style="list-style-type: none"> • Ongoing tax planning • Tax harvesting (x1-4) • Tax return review
EQUITY COMPENSATION <i>RSUs, ISOs, NSOs</i>	<ul style="list-style-type: none"> • Annual review • Trade strategy (x1-2) 	<ul style="list-style-type: none"> • Regular review • Trade strategy (x4 or as needed) 	<ul style="list-style-type: none"> • Includes prior tier benefits • Ongoing tax tracking of RSUs and/or options
PROTECTION <i>INSURANCE & ESTATE</i>	<ul style="list-style-type: none"> • Benefits review (x1) • Estate plan review (x1) • Insurance reviews 	<ul style="list-style-type: none"> • Includes prior tier benefits • Attorney meetings (x1-2) 	<ul style="list-style-type: none"> • 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.**

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Our current disclosure brochure, Form ADV Part 2, is available for your review [here](#).