



FOUR LEVELS OF PLANNING BENCHMARK PRICING

Engagement	Planning Levels	Road Map	Appointments	Cost	Scope
FPA Type	FPA Level	RM Code	Meeting Frequency	Standard Price	What services will be provided?
Initial	Level 1	1.2	Semiannual	\$2,000	Gather & Organize, Maintenance, CF & ER*, Debt*
		1.4	Quarterly	\$2,500	Gather & Organize, Maintenance, CF & ER*, Debt*
	Level 2	2.2	Semiannual	\$4,000	Level 1 + Investments, Retirement, Social Security*
		2.4	Quarterly	\$4,500	Level 1 (1.2) + Education Planning*, Roth Conversion*
	Level 3	3.4	Quarterly	\$6,000	Level 2 (2.2) + Insurance* (Life, LTC, Disability, P&C, etc.), Real Estate*, Business*
	Level 4	4.4	Quarterly	\$8,000+	Level 3 (3.4) + "The Kitchen Sink" (Personal Planning Menu, Served Buffet Style)
Renewal	Level 1 Renewal AKA "Level 0"	0.1	Annual	\$1,000	Renewal Maintenance + Annual Plan Update (coordinated with renewal discussion)
		0.2	Semiannual	\$1,500	Renewal Maintenance + Level 1 (1.2)
	Level 2 Renewal AKA "Level 5"	5.2	Semiannual	\$2,500	Renewal Maintenance + Level 2 (2.2)
		5.4	Quarterly	\$3,000	Renewal Maintenance + Level 2 (2.4)
Wealth Coach	"Level 1 + Wealth Coach"	WC 1.2	Semiannual	\$2,500	Wealth Coach + Level 1 (1.2)
		WC 1.4	Quarterly	\$3,000	Wealth Coach + Level 1 (1.4)
	"Level 2 + Wealth Coach"	WC 2.2	Semiannual	\$4,000	Wealth Coach + Level 2 (2.2)
		WC 2.4	Quarterly	\$4,500	Wealth Coach + Level 2 (2.4)
	"Level 3 + Wealth Coach"	WC 3.4	Quarterly	\$6,500	Wealth Coach + Level 3 (3.4)

* indicates a topic will be addressed at no additional charge if applicable