CLIENT SERVICE TIERS

	SILVER	GOLD	PLATINUM	DIAMOND
Primary Advisor	Brandon	Brendan/Brandon	Brendan	Brendan
Maximum Meetings Per Year	Semi-Annual (2 meetings per year)	Every 4 Months (3 meetings per year)	Quarterly (4 meetings per year)	Monthly (12 meetings per year)
Maximum Annual Service Hours	5 hours	10 hours	15 hours	15+ hours
Examples of services that may be provided	Annual financial independence progress review, assistance with setup of and access to Waymark's account consolidation software, basic budgeting and debt management, general financial education	**SILVER SERVICE TIER PLUS:** Personalized goal setting, detailed review of 401(k)/403(b) investment strategies, assistance with maximizing employer-provided benefits, strategic planning for education costs, annual review of completed tax return, audit of your insurance coverage	**GOLD SERVICE TIER PLUS**: Collaboration with your attorney and tax professional to develop proactive tax & estate planning strategies, guidance on major purchases and/or major life decisions such as job changes, charitable giving consultation, special needs planning	**PLATINUM SERVICE TIER PLUS:** Legacy planning and wealth transfer strategies, long-term care crisis guidance, support during divorce process, financial planning for your children and/or parents
Fee	**$1,500**	**$2,500**	**$3,500**	**TBD**

ADVISORY INVESTMENT MANAGEMENT

Examples of services that may be provided include:
Portfolio management, regular review of portfolio performance, access to LPL's online investment client portal, beneficiary review, tax loss harvesting, required minimum distribution (RMD) calculation, risk tolerance analysis, regular monitoring of overall portfolio asset allocation

Fee %	Assets Under Management (AUM)
1.50%	$0-$500k
1.25%	$500k-$2.5MM
1.00%	$2.5MM-$5MM
0.75%	$5MM+