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RICH® Planning Experience **Fee Proposal**



PRESENTED BY

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RICH® Planning Experience

A comprehensive planning process that targets both your financial and emotional goals.



Financial Position & Facts

You will receive a current financial position & facts summary showing where you stand, based on an extensive fact-finding process. Upon completion, we deliver a written summary of all planning areas covered.



Planning Areas

- Current Financial Position
- Retirement Planning
- Investment / Asset Allocation
- Risk Management / Protection
- Education Planning



Technology & Access



Aggregated Assets
Updated nightly



24/7 Access
Account values, balance sheet, allocation



Private Vault
Wills, trusts, tax returns, passports



Email Alerts
Securities, allocation & market changes

Your plan will have a focus in the following areas:



Retirement Planning



Investments / Asset Allocation



Risk Management



Education Planning



Estate Planning

RICH® Planning Details

In your Financial Plan we will address the following areas:

Fields below can be customized for each client. Review and adjust the planning details as needed.

Retirement Planning

Define personalized goals and objectives to project whether your future income and assets are sufficient to fund your desired retirement lifestyle
Analyze surplus inflows

Investment Planning

Evaluate current investment strategy in relation to your objectives and personal risk tolerance
Develop a comprehensive asset allocation and marketplace diversification strategy tailored to your

FEE FOR SERVICE

\$3,000

Comprehensive Plan, Analysis & Aggregation Software Access

Although we have a 180-day planning cycle to fact find, organize and finalize your plan, we will spend as much time as needed during the year to hold you accountable and implement your plan.

Approximately one year after your plan delivery, we will meet for your Annual Review / Plan Renewal & determine what additional work, if any, needs to be completed, and you will have the option to renew your plan.

Renewal fees typically range from 60–100% of your initial planning fee, depending on the extent and complexity of your updates. Renewal is required to maintain access to your personalized website and advisor concierge services.

If you do not find value in the planning process and the services we provide, you are under no obligation to renew your financial plan and no future fees will be charged beyond your initial planning fee.



RICH® Planning Experience

Securities offered through LPL Financial. Member FINRA/SIPC. Advisory services offered through NewEdge Advisors, LLC, a registered investment adviser. NewEdge Advisors, LLC and Jacobs, Coolidge & Company, LLC are separate entities from LPL Financial.

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