

Partners in Financial Planning, LLC  
Retainer Fee Schedule

	First Year	Second Year
Base Fee	\$ 2,000	\$ 1,500
Base Fee with Tax Preparation *	\$ 2,500	\$ 2,000
<b>PLUS</b>		
Investment Fee		
First \$500,000	0.70%	0.60%
Next \$500,000	0.60%	0.50%
Next \$1 million	0.50%	0.40%
Amounts over \$2 million	0.40%	0.30%
Outside accounts **	0.40%	0.30%
Total Minimum Fee	\$ 3,500	\$ 2,500

**NOTE: Our minimum annual fees are \$3,500 for the first year and \$2,500 for subsequent years. If the calculated fee under the above schedule is lower, then the minimum fee would apply.**

EXAMPLE FEES WITHOUT TAX PREPARATION							
First Year				Second Year			
Assets	Base Fee	Inv Fee	Total Fee	Assets	Base Fee	Inv Fee	Total Fee
100,000	\$ 2,000	\$ 700	\$ 3,500 ***	100,000	\$ 1,500	\$ 600	\$ 2,500 ***
300,000	\$ 2,000	\$ 2,100	\$ 4,100	300,000	\$ 1,500	\$ 1,800	\$ 3,300
500,000	\$ 2,000	\$ 3,500	\$ 5,500	500,000	\$ 1,500	\$ 3,000	\$ 4,500
700,000	\$ 2,000	\$ 4,700	\$ 6,700	700,000	\$ 1,500	\$ 4,000	\$ 5,500
1,000,000	\$ 2,000	\$ 6,500	\$ 8,500	1,000,000	\$ 1,500	\$ 5,500	\$ 7,000
1,500,000	\$ 2,000	\$ 9,000	\$ 11,000	1,500,000	\$ 1,500	\$ 7,500	\$ 9,000
2,000,000	\$ 2,000	\$ 11,000	\$ 13,000	2,000,000	\$ 1,500	\$ 9,500	\$ 11,000
3,000,000	\$ 2,000	\$ 15,000	\$ 17,000	3,000,000	\$ 1,500	\$ 12,500	\$ 14,000
5,000,000	\$ 2,000	\$ 23,000	\$ 25,000	5,000,000	\$ 1,500	\$ 18,500	\$ 20,000

\* Tax Preparation assumes simple individual return. Complex returns and corporate returns extra.

\*\* Outside accounts include 401ks, 403bs and other accounts not held at one of our custodians.

\*\*\* Minimum fee applies, since calculated fee is lower than the minimum fee.