

Partners in Financial Planning, LLC  
 Retainer Fee Schedule

Base Fee	\$ 2,000
Base Fee with Tax Preparation *	\$ 2,500
Investment Fee	
First \$500,000	0.50%
Next \$500,000	0.40%
Next \$1 million	0.35%
Amounts over \$2 million	0.25%

NOTE: Our minimum annual fee for the first year of services is \$3,500. If the calculated fee under the above schedule is lower, then the minimum fee would apply. There is no minimum fee for the second and subsequent years.

\* Tax Preparation assumes simple individual return. Complex returns and corporate returns may incur additional fees.

EXAMPLE FEES WITHOUT TAX PREPARATION				
Investment Assets	Base Fee	Investment Fee	Total Fee	Effective % of Assets
150,000	\$ 2,000	\$ 750	\$ 2,750	1.83%
300,000	\$ 2,000	\$ 1,500	\$ 3,500	1.17%
500,000	\$ 2,000	\$ 2,500	\$ 4,500	0.90%
700,000	\$ 2,000	\$ 3,300	\$ 5,300	0.76%
1,000,000	\$ 2,000	\$ 4,500	\$ 6,500	0.65%
1,500,000	\$ 2,000	\$ 6,250	\$ 8,250	0.55%
2,000,000	\$ 2,000	\$ 8,000	\$ 10,000	0.50%
3,000,000	\$ 2,000	\$ 10,500	\$ 12,500	0.42%
5,000,000	\$ 2,000	\$ 15,500	\$ 17,500	0.35%