

Partners in Financial Planning, LLC

Retainer Fee Schedule

Effective March 20, 2019

|   |    |                                |
|---|----|--------------------------------|
| Minimum Financial Planning and Investment Fee | \$ | 5,000                          |
| Minimum Fee with Tax Preparation *            | \$ | 5,600                          |
| Additional Investment Management Fee          |    |                                |
| First \$500,000                               |    | 0.00% (covered by minimum fee) |
| Amounts over \$500,000                        |    | 0.25%                          |

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

| EXAMPLE FEES WITHOUT TAX PREPARATION |  |  |  |  |  |
|--------------------------------------|--|--|--|--|--|
|--------------------------------------|--|--|--|--|--|

| <u>Investment</u><br><u>Assets</u> | <u>Minimum</u><br><u>Fee</u> | <u>Additional</u><br><u>Invest Fee</u> | <u>Total</u><br><u>Fee</u> | <u>Effective</u><br><u>% of Assets</u> |
|------------------------------------|------------------------------|--|----------------------------|--|
| 150,000                            | \$ 5,000                     | \$ -                                   | \$ 5,000                   | 3.33%                                  |
| 300,000                            | \$ 5,000                     | \$ -                                   | \$ 5,000                   | 1.67%                                  |
| 500,000                            | \$ 5,000                     | \$ -                                   | \$ 5,000                   | 1.00%                                  |
| 700,000                            | \$ 5,000                     | \$ 500                                 | \$ 5,500                   | 0.79%                                  |
| 1,000,000                          | \$ 5,000                     | \$ 1,250                               | \$ 6,250                   | 0.63%                                  |
| 1,500,000                          | \$ 5,000                     | \$ 2,500                               | \$ 7,500                   | 0.50%                                  |
| 2,000,000                          | \$ 5,000                     | \$ 3,750                               | \$ 8,750                   | 0.44%                                  |
| 3,000,000                          | \$ 5,000                     | \$ 6,250                               | \$ 11,250                  | 0.38%                                  |
| 5,000,000                          | \$ 5,000                     | \$ 11,250                              | \$ 16,250                  | 0.33%                                  |