

ONEteam

FIGHTING FOR YOUR *financial freedom*

	THE BUDGET, SAVE & BE DEBT FREE PLAN	DIY FINANCE CHECK-UP	INVESTMENT MANAGEMENT (ONLY)	BASIC FINANCIAL PLAN	ONGOING COMPREHENSIVE FINANCIAL PLANNING
FEES	\$150	\$200	---	\$250	\$900 or \$175/ 6 mos
BUDGET & CASH FLOW	●	●	---	●	●
DEBT & STUDENT LOAN ASSESSMENT	●	●	---	●	●
INVESTMENT ADVICE		●	●	●	●
INVESTMENT MANAGEMENT			●	●	●
***ADDITIONAL MANAGEMENT FEES BELOW					
CLIENT PORTAL			●	●	●
QUARTERLY CHECKPOINTS			●	●	●
UNLIMITED E-MAIL/TEXT/CALL			●	●	●
PRIORITIZE CONCERNS			●	●	●
GOAL PLANNING			●	●	●
HIGH-LEVEL RETIREMENT PLANNING				●	●
HIGH-LEVEL LEGACY/EDUCATION PLANNING				●	●
HIGH-LEVEL LIFE INSURANCE NEEDS ANALYSIS				●	●
ESTATE PLANNING ANALYSIS (WILL/TRUST)				●	●
DETAILED RETIREMENT PLANNING					●
DETAILED LEGACY/EDUCATION PLANNING					●
LIFE INSURANCE NEEDS ANALYSIS					●
PROACTIVE TAX ANALYSIS					●
MILITARY BENEFITS & PENSION PLANNING					●
EMPLOYEE BENEFITS ANALYSIS					●
MARRIAGE PLANNING					●
DIVORCE PLANNING					●
AGING PARENT CARE PLANNING					●
INHERITANCE PLANNING					●
WIDOWER/WIDOW PLANNING					●
MORTGAGES ANALYSIS					●

HOURLY FINANCIAL PLANNING

\$150 per (2) hours

INDIVIDUAL TAX PREPARATION

Fees start @ \$350 per return
& increase based on complexity

A LA CARTE (PROJECT BASED).

Fees will vary depending
on service

ESTATE PLANNING

*See next page for pricing

INVESTMENT MANAGEMENT SERVICES

Account Value	Annual Advisory Fee
\$0 - \$50,000	2.00%
\$50,001 - \$100,000	1.50%
\$100,001 - \$500,000	1.00%
\$500,001 - \$1,000,000	0.95%
\$1,000,001 - \$2,000,000	0.85%
\$2,000,001 & ABOVE	0.80%

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GUARDIAN

FOR PARENTS WITH
MINOR CHILDREN WHO
AREN'T READY TO CREATE
A WILL

WILL

GREAT FOR SINGLE INDIVIDUALS
OR MARRIED COUPLES.
A WRITTEN PLAN FOR WHAT
SHOULD HAPPEN TO YOUR
ASSETS & WHO WILL LOOK
AFTER YOUR CHILDREN,
IF SOMETHING HAPPENS TO
YOU OR YOUR SPOUSE

TRUST

AVOID PROBATE WITH ALL THE
DOCUMENTS NEEDED TO PROTECT
AND TRANSFER THE THINGS THAT
MATTER MOST TO YOU

FEES

DOCUMENTS

NOMINATION OF GUARDIAN

LAST WILL & TESTAMENT

HIPAA AUTHORIZATION

LIVING WILL

POWER OF ATTORNEY

TRUST

CERTIFICATE OF TRUST

SCHEDULE & TRANSFER OF ASSETS

POUR OVER WILL

MEDICAL POWER OF ATTORNEY

ADVANCE HEALTH CARE DIRECTIVE

DEED(S) FOR REAL PROPERTY

BENEFITS

STATE SPECIFIC

NOMINATE GUARDIANS FOR CHILDREN

SPECIFY HEALTHCARE WISHES

NOMINATE GUARDIANS FOR PETS

DETERMINE FINAL ARRANGEMENTS

LEAVE SPECIFIC GIFTS

NOTE SPECIAL REQUESTS

AVOID PROBATE COURT

TRANSFER ASSETS INTO TRUST

ASSETS GO DIRECTLY TO BENEFICIARIES

	GUARDIAN	WILL	TRUST
FEES	\$130	\$450	\$1,200
NOMINATION OF GUARDIAN	●	●	●
LAST WILL & TESTAMENT		●	●
HIPAA AUTHORIZATION		●	●
LIVING WILL		●	●
POWER OF ATTORNEY		●	●
TRUST			●
CERTIFICATE OF TRUST			●
SCHEDULE & TRANSFER OF ASSETS			●
POUR OVER WILL			●
MEDICAL POWER OF ATTORNEY			●
ADVANCE HEALTH CARE DIRECTIVE			●
DEED(S) FOR REAL PROPERTY			●
			*ADDITIONAL \$250
BENEFITS			
STATE SPECIFIC	●	●	●
NOMINATE GUARDIANS FOR CHILDREN	●	●	●
SPECIFY HEALTHCARE WISHES		●	●
NOMINATE GUARDIANS FOR PETS		●	●
DETERMINE FINAL ARRANGEMENTS		●	●
LEAVE SPECIFIC GIFTS		●	●
NOTE SPECIAL REQUESTS		●	●
AVOID PROBATE COURT			●
TRANSFER ASSETS INTO TRUST			●
ASSETS GO DIRECTLY TO BENEFICIARIES			●