Wade Arnold, CFP®
Wealth Advisor
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Financial Planning & Consulting Packages

Starter	Essential	Premier
Ideal For: Individuals looking to organize their financials and plan for the future- "Accumulator"	Ideal For: Individuals or Families looking to set and monitor financial goals- "Pre-Retirees"	Ideal For: Individuals or families entering or in retirement or business owners with complex financial needs – "Retirement & Legacy"
Meetings: Annual	**Meetings: Semi-Annual**	**Meetings: Quarterly**
	Starter Plus:	**Essential Plus:**
✓ Set Financial Goals ✓ Portfolio/Risk Assessment ✓ Retirement Account Check-up ✓ Debt Management Review ✓ Net Worth Summary ✓ Evaluate Employee Benefits ✓ Online Financial Portal ✓ Fiduciary & Accoutablility Partner	✓ Portfolio/Risk Analysis ✓ Tax Planning Strategies ✓ Debt Management Strategies ✓ Roth Conversion Review ✓ Education/College Funding ✓ Insurance Planning ✓ Basic Estate Planning	✓ Retirement Income Planning ✓ Wealth Transfer Planning ✓ Charitable Giving Strategies ✓ Stock Options Analysis ✓ Business Planning ✓ Advanced Estate Planning ✓ Collab. With Third Party Professionals (Attorney, CPA, etc.)
*Initial Plan/Setup: $1,200 Ongoing Planning: $149/month or >$250k AUM**	*Initial Plan/Setup: $2,500 Ongoing Planning: $249/month or >$500k AUM**	*Initial Plan/Setup: $4,500+ Ongoing Planning: $499/month or >$1M AUM**

*Ongoing Financial Planning Costs may be discounted or waived with AUM Commitment

Hourly Planning & Consulting

I offer ala carte planning services starting at **$300/hour** depending on your situation and needs. Hours will be estimated and proposed on a project-by-project basis, prior to the start of any work.

Asset Management Services

Account Value	Annual Advisory Fee	Included Services
initial $249,999	1.25%	• Portfolio Review • Investment Selection • Rebalancing • Gain/Loss Harvesting • Time Horizon Analysis • Risk Tolerance • Asset Allocation • Investment Research • Financial Planning*
next $250k – $999,999	1%	
next $1M – $2,499,999	.9%	
$2.5M +	.85%	