



Comprehensive Financial Planning Services for

	Residents & Fellows Flat Fee: \$750/quarter	Early-Career Physicians Flat Fee: \$1,250/quarter	Mid-Career Physicians Flat Fee: \$2,500 /quarter	Late-Career Physicians Flat Fee: \$3,750/quarter
Ideal for:	Looking to get started on the right foot	Positive net worth and building toward financial independence	Doctors with over \$1M of investments* and more complex finances	Physicians and retirees with the most complex financial situations
One-time set-up fee	\$1,000	\$1,000	\$1,000	\$1,000
On-going financial planning	✓	✓	✓	✓
Recommendations for customized portfolios of all investment accounts	✓	✓	✓	✓
Annual rebalancing recommendations for all investment accounts	✓	✓	✓	✓
In-house investment management	Reduced fee	Reduced fee	Up to \$2M*	\$2M - \$5M*
Automatic account rebalancing, tax loss harvesting	Included with in-house management			
3 scheduled meetings per year	✓	✓	✓	✓
Meetings for financial planning events on an as-needed basis	✓	✓	✓	✓
Phone calls and emails on an as-needed basis	✓	✓	✓	✓
Coordinate outside advisors (CPA, Lawyer, Disability, Life Ins, etc.)	✓	✓	✓	✓
Attend meetings and work with outside advisors			✓	✓
Personal income tax preparation	\$	\$	\$	✓
*not counting employer-sponsored retirement plans such as 401(k)s, 403(b)s, 457(b)s, 401(a)s, etc.				