

PLANPREP FEE SCHEDULE FOR ADVISORS

effective February 1, 2017



Service	Fee	Description
Plan Preparation	\$850+ <hr/> or a Quote <hr/> or \$90 to \$180 per Hour	<ul style="list-style-type: none"> • Analysis and entry of data and assumptions • Written follow up to clarify data and strategies • Preparation of customized, focused reports (Wealth Plan) • Either a personalized summary with an objective action plan, a PowerPoint presentation, or a detail of the baseline assumptions • Communications by phone over 30 minutes per engagement may be billed at our highest hourly rate
Total Asset Values of \$3 million or more	Add \$150 to \$850 for every \$1,000,000	Round the value down to the nearest million. Example: Additional fee for total assets of \$4.7 million is calculated as follows: $\$850 + (2 \times \$150) = \$850 + \$300 = \$1,150$
Coaching / Case Consultations / Planning by the Hour	\$90 to \$180 per Hour	Want to discuss a particular case or need advice beyond plan preparation? We can help you analyze cases of virtually any size or complexity, or coach you on delivering a plan, introducing planning to existing clients, or approaching prospects. This is done by phone and/or email.
Business Planning	\$90 to \$180 per Hour	This may be charged on top any plan preparation fees, but it will be included as part of a quoted fee.
Customizable Fact Finders & Forms	\$1,500	Receive a zip file with all of our fact finders, forms, checklists, templates for an eMoney report and our executive summary, a sample meeting agenda, and more.
Virtual Meetings and Phone Calls	\$180 per Hour	PlanPrep can help you uncover more opportunities with your prospects, and present reports and recommendations virtually. Travel time is billed at half this rate plus all related expenses. A deposit is required for travel expenses.

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PlanPrep LLC - A Registered Investment Adviser ~ CA Insurance License # 0D33315

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Service	Fee	Description
Onsite Meetings	\$1,500 per Day on Site plus Expenses	PlanPrep can help you uncover more opportunities with your prospects, and present reports and recommendations in person. Travel time is billed at half this rate plus all related expenses. A deposit is required for travel expenses.
Public Speaking	\$180 per Hour by Phone \$2,500 per Day on Site plus Expenses	Burt Williamson is available to present by phone or at conferences, regional meetings and events. Presentations are designed to: <ul style="list-style-type: none">• Empower attendees to do more business with the right clients and prospects• Close more business consistently and in less time using the right presentation techniques• Approach higher net worth individuals and business owners with confidence• Educate on topics such as portfolio analysis, restricted stock, insurance sales, estate planning, and more

Be sure to have all planning materials gathered before submitting to PlanPrep. Plan completion is fifteen (15) business days or less from receipt of all planning materials.

Planning fees are deemed earned when you initiate PlanPrep for each request and are billed through PayPal. You may request, or we may provide, a fee quote after we have reviewed all of the pertinent documents.

It is your responsibility to review all reports within ten (10) business days of delivery from PlanPrep. Additional fees may apply for changes, updates or corrections after the 10 business days have passed for work that exceeds 30 minutes. Hourly billing is done in 15 minute increments with a one hour minimum.