

PLANPREP FEE SCHEDULE

effective May 25, 2016



Planning fees are billed through PayPal up front and are deemed earned when you engage PlanPrep for each request. 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.

PlanPrep will make specific investment and insurance recommendations if requested at the hourly rate in addition to the planning services.

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.

Service	Fee	Description
Plan Preparation	\$850+	<ul style="list-style-type: none"> • Analysis and entry of data and assumptions • Follow up to clarify data and strategies • Preparation of customized, focused reports (Wealth Plan) • A single revision of the Wealth Plan at your request • A personalized executive summary outlining the clients' financial position with an objective action plan. • One additional revision may be requested at no charge in lieu of PlanPrep's drafting a summary • Communications by phone may be billed at our hourly rate.
Total Asset Values of \$3 million or more	Add \$150 for each extra \$1,000,000	<p>Rounded down to the nearest million.</p> <p>Example: Additional fee for total assets of \$4.7 million is calculated as follows:</p> $\$850 + (2 \times \$150) = \$850 + \$300 = \$1,150$
Retirement Only Module	\$600	You fill out our one-page retirement planning module. The report includes a cash flow summary, cash flow details, earliest retirement date, required savings, maximum spending in retirement, and required distributions. Monte Carlo, executive summary, insurance analyses or estate reports are not provided.
Business Valuations	\$500 per Company per Report	A net worth statement is not complete if a business owner doesn't know what the company is worth if he or she is going to sell it someday. Valuations are per business per report. Reports include 4 values and may include some key performance indicators.

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Customized Forms	\$3,500	You receive our process forms and fact finders, a Wealth Plan and Executive Summary template, and a sample meeting Agenda. This does not require you to engage our plan preparation services.
Business Planning	\$200 per Hour	This may be charged on top any plan preparation fees, but it will be included as part of a quoted fee.
Case Consultations	\$200 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.
Client Meetings and Phone Calls	\$300 per Hour	PlanPrep can help you uncover more opportunities with your prospects, and present reports and recommendations virtually or in person. Travel time is billed at \$150 an hour plus all related expenses. A deposit is required for travel expenses.
Remote Coaching & Training	\$700 per Hour	Burt Williamson can help you uncover more opportunities with your prospects, and present reports and recommendations virtually or in person. Travel time is billed at \$150 an hour plus all related expenses. A deposit is required for travel expenses.
Public Speaking	\$5,500 per Day on Site plus Expenses	<p>Burt Williamson is available to present by phone or at conferences, regional meetings and events. Presentations are designed to:</p> <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 with the right presentation techniques • Approach higher net worth individuals and business owners with confidence • Educate on topics such as restricted stock, insurance sales, estate planning, and more