

- Financial Planning upfront cost Varies based on scope of work
  - 50% due at engagement, 50% due at delivery
  - Additional ongoing strategy and planning available for a monthly fee price varies based on level of effort
    - Services include depreciation analysis, tax strategy, business planning, insurance strategies, retirement analysis, college planning, social security maximization, etc.
- Fee Based Pricing for Investment Management and Ongoing Financial Planning – Aggregated on a family relationship level
  - \$0 to \$1,000,000 | 1.1%
  - \$1,000,001 to \$2,000,000 | .95%
  - \$2,000,001 to \$3,000,000 | .85%
  - \$3,000,001 to \$4,000,000 | .75%
  - \$4,000,001 to \$5,000,000 | .65%
  - \$5,000,001 to \$6,000,000 | .55%
  - \$6,000,000+|.45%

The financial consultants at Arrow Point Wealth Management are registered representatives with and securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC

<sup>\*</sup>As breakpoints are reached fee is adjusted down