Oliver Financial Planning, LLC

Financial Planning Program

The Financial Planning Program provides year-round financial planning and advice for a flat monthly fee. New clients meet with us over a series of meetings to address gaps in their personal finances, establish an investment strategy, and create a goals-based financial plan. The Program also provides the following ongoing services:

- Year-round, as-needed financial planning advice,
- Annual portfolio rebalancing instructions,
- Annual financial plan update,
- Annual review meeting with Financial Snapshot and Action Plan reports, and
- Access to our portfolio performance and financial planning applications.

This Program offers transparent, flat-fee pricing coupled with a low-cost approach to investing. You maintain control of your investment accounts while getting professional advice. Portfolio performance and financial planning tools are available to support communication and encourage planning.

New clients pay an initial fee of $1,200 plus a flat monthly fee of $125, $200 or $300 based on the guidelines below. Your monthly fee is determined at our Get Acquainted Meeting.

Guidelines	**Program I**	**Program II**	**Program III**
Income	Up to $100,000	Up to $250,000	$250,000+
Investments	Up to $500,000	Up to $2 million	$2 million+
Net worth	Up to $750,000	Up to $2.5 million	$2.5 million+
Complexity	401k, 403b, etc. IRAs College savings One income earner	401k, 403b, etc. IRAs College savings Two income earners Taxable investments Pensions, annuities Distribution planning	401k, 403b, etc. IRAs College savings Two income earners Taxable investments Pensions, annuities Distribution planning Private investments Employer stock Business owner
Monthly fee	$125	$200	$300