

FEE SCHEDULE



I'm a "fee-only" financial planner. The only compensation that I receive is what you pay me. I don't sell investments. I don't sell insurance.

Here are the services I offer, and what they cost.

Consultation Packages

In one or two sessions, we lay your cards on the table and form a targeted plan to get you on your feet and headed toward your goals.

Stop-Loss

We arrange a 90-minute call via phone or Skype. We work together to identify and target one or two financial pressure points, and create a detailed, values-based, actionable plan for addressing them.



\$300

Blissful Budget

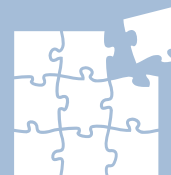
In a preliminary 30-minute call, we survey your cash flow situation and identify the detailed information we'll need for a deeper dive. In a subsequent 90-minute call, we get to the heart of your financial inflows and outflows, and craft a liveable, goal-driven budget.



\$600

Custom

We discuss your unique needs. Using either the Stop-Loss or Blissful Budget as a starting point, I propose a consultation plan and draft a fee quote.



starting at
\$500

Monthly Subscription

We lay the foundation for productive financial collaboration, and craft a plan. Then, I offer ongoing support.

Start-Up Phase



At the beginning of this ongoing partnership, we gain insight into your current financial situation through the following tools:

- Financial and life goal prioritization
- Cash flow assessment
- Personal balance sheet

We compile these over the course of our three initial meetings. By the end of this first phase, we've mutually identified the next steps for you to take on the path toward your personal goals.

starting at
\$500

Ongoing Monthly Support



With our roadmap in hand, I help you keep your goals in sight. I provide ongoing support and reminders to make sure the little details of your financial life don't fall by the wayside. And as life throws you its curve balls, I help you tweak your plan so that your path remains clear. Whether you're changing jobs, expanding your family, moving into a new home, or planning for some other exciting life change—I'm only a call or email away.

+
starting at
\$150

Fees will be higher for clients with more complex financial situations.