

Investment Advisory Services

We charge a percentage fee based on a client's total assets under management for implementation of investment plan, ongoing monitoring, and periodic reviews.

Financial Planning & Consulting

We typically charge a flat fee, but may offer an hourly fee arrangement for clients with complex situations. When charging a flat fee, we still track our hours and charge the lesser of the hourly fee or flat fee.

Retirement Plan Consulting

We charge any combination of a flat fee, hourly fee, or annual percentage fee based on total assets under management.