PRICE PLANNING

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NEW CLIENT FEE CALCULATION

Sam & Sarah Sample
January 15, 2012

Base Fee[1]	$	4,400
Less Services Not Chosen:		
Cash Flow & Retirement Planning		-
Investment Advice		-
Tax Planning		-
Tax Preparation		(600)
Insurance Needs Analysis		-
Education Funding & Estate Planning		-
Net Fee	**$**	**3,800**

Fee Schedule:		
Amount due upon signing agreement (25%)	$	950
Amount to be invoiced in May, 2012 (25%)		950
Amount to be invoiced in August, 2012 (25%)		950
Amount to be invoiced in November, 2012 (25%)		950
	$	**3,800**

[1] Client, working client and child; Financial Life Cycle Stage = Early Accumulation