MILESTONES
FINANCIAL PLANNING, LLC

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Milestones Financial Planning, LLC Fee Schedule

For Investment Advisory Accounts

Account Value	Option One	Option Two	Minimum Fee
Under $100k	150 basis points	100 basis points	$125 quarterly
$100k – $500k	100 basis points	75 basis points	$125 quarterly
$500k – $1M	75 basis points	50 basis points	$125 quarterly
$1M and up	50 basis points	40 basis points	$125 quarterly

Cash and cash-equivalent accounts under Milestones Financial Planning, LLC's management are included in the above. Investment advisory account fees are payable quarterly in advance of each calendar quarter. In the event that an account is open for less than an entire calendar quarter, the Advisor's fee will be prorated for the period that the account is open. If the account is terminated before the end of the quarter, the Client's prorated fee for the remainder of the quarter will be refunded by the Advisor as of the date of termination.

For Company-Sponsored Plans: SIMPLE, SEP, 401(k), etc.

Account Value	Option One	Option Two	Minimum Fee
Up to $10k	n/a	n/a	$150 annually
$10k to $100k	150 basis points	100 basis points	begins at $37.50/quarter
$100k – $500k	100 basis points	75 basis points	begins at $250.00/quarter
$500k – $1M	75 basis points	50 basis points	begins at $937.50/quarter
$1M and up	50 basis points	40 basis points	begins at $1250.00/quarter

For Financial Life Planning

Financial Life Planning services are fixed fee based. Rates begin at $2,500 depending upon the nature and complexity of each client's circumstances. Rates for succeeding years are generally priced at ½ of the initial plan fee. Rates are negotiable at the discretion of the Investment Advisor.

For Personal Financial Overview

$850 for single clients
$975 for couples

For Office Consultations

$150 per hour with a one hour minimum.

Definitions:

Option One – Non-Financial Life Planning Clients

Option Two – Financial Life Planning Clients

Basis Points – the amount charged for investment advisory services. For example, 100 basis points charged on an account with a value of $200,000 would be calculated as follows: ($200,000 x 1.00) / 4 = $500 per quarter.

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