MILESTONES
FINANCIAL PLANNING, LLC

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Exhibit B:
Fee Schedule

For Investment Advisory Accounts

Account Value	Option One	Option Two	Minimum Fee
Up to $25k	n/a	n/a	$ 400/yr ($ 100 quar)
$25k – $100k	150 basis points	100 basis points	$ 500/yr ($ 125 quar)
$100k – $500k	100 basis points	75 basis points	$1,000/yr ($ 250/quar)
$500k – $1M	75 basis points	50 basis points	$3,750/yr ($ 938/quar)
$1M and up	50 basis points	40 basis points	$5,000/yr ($1,250/quar)

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 Planning

Financial Planning services are fixed fee based. The rate charged depends upon the nature and complexity of each client's circumstances. Rates for succeeding years are generally priced at ½ of the initial plan fee and are negotiable at the discretion of Milestones Financial Planning.

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. Accounts in the same household are aggregated for purposes of determining basis points charged. **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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