



**FIREBRAND**  
WEALTH MANAGEMENT

# FINANCIAL PLANNING + INVESTMENT MANAGEMENT

COACH

**\$750,000**

Asset Minimum

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BEST SUITED FOR

CLIENTS WITH  
LOWER COMPLEXITY

RETIREMENT >15 YEARS AWAY  
SAVINGS STRATEGIES  
TAX PLANNING NEEDS  
RSUS / STOCK OPTIONS (ISO, NSO)  
RETIREMENT PLANNING  
MULTI-GENERATIONAL PLANNING

**1.00% of Assets**

\$750,000 - \$999,999

DIRECTOR

**\$1,000,000**

Asset Minimum

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BEST SUITED FOR

CLIENTS WITH  
HIGHER COMPLEXITY

RETIREMENT <15 YEARS AWAY  
RSUS / STOCK OPTIONS (ISO, NSO)  
LIQUIDITY EVENTS  
COMPLEX TAX / ESTATE NEEDS  
FAMILY TRUSTS/ BUSINESSES  
RETIREMENT PLANNING  
MULTI-GENERATIONAL PLANNING

**0.90% of Assets**

\$1,000,000 - \$2,499,999\*

PRODUCER

**\$2,500,000**

Asset Minimum

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BEST SUITED FOR

CLIENTS WITH  
HIGHEST COMPLEXITY

RETIREMENT <15 YEARS AWAY  
MULTIPLE COMP STRUCTURES  
LIQUIDITY EVENTS  
COMPLEX TAX / ESTATE NEEDS  
FAMILY TRUSTS/ BUSINESSES  
RETIREMENT/INCOME PLANNING  
MULTI-GENERATIONAL PLANNING

**0.80% of Assets**

\$2,500,000 - \$4,999,999\*

\*See full fee schedule for additional tiers

# FINANCIAL PLANNING + INVESTMENT MANAGEMENT

ANNUAL SERVICES	COACH	DIRECTOR	PRODUCER
INVESTMENT MANAGEMENT	<ul style="list-style-type: none"> <li>• Goal-based asset allocation</li> <li>• Sustainable investing</li> <li>• Regular rebalancing</li> <li>• Tax-loss/gains harvesting</li> <li>• Cash Management</li> <li>• Concentrated stock mgt</li> </ul>	<ul style="list-style-type: none"> <li>• Goal-based asset allocation</li> <li>• Sustainable investing</li> <li>• Regular rebalancing</li> <li>• Tax-loss/gains harvesting</li> <li>• Income strategies</li> <li>• Cash Management</li> <li>• Option overlay strategies</li> <li>• Concentrated stock mgt</li> </ul>	<ul style="list-style-type: none"> <li>• Goal-based asset allocation</li> <li>• Sustainable investing</li> <li>• Regular rebalancing</li> <li>• Tax-loss/gains harvesting</li> <li>• Income strategies</li> <li>• Cash Management</li> <li>• Option overlay strategies</li> <li>• Concentrated stock mgt</li> </ul>
PLANNING SESSIONS PLUS REGULAR CHECK-INS	TWO	THREE	FOUR
TAX PLANNING	<ul style="list-style-type: none"> <li>• Q4 Tax Planning</li> <li>• Tax Return Review</li> </ul>	<ul style="list-style-type: none"> <li>• Q4 Tax Planning</li> <li>• Tax Return Review</li> <li>• Coordination with CPA</li> <li>• Facilitate tax payments</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing Tax Planning</li> <li>• Tax Harvesting 1-4x</li> <li>• Tax Return Review</li> <li>• Facilitate tax payments</li> </ul>
EQUITY COMPENSATION	<ul style="list-style-type: none"> <li>• Annual review</li> <li>• Trade Strategy 1-2x</li> </ul>	<ul style="list-style-type: none"> <li>• Regular Review</li> <li>• Trade Strategy 4x or as needed</li> </ul>	Includes Director Benefits + <ul style="list-style-type: none"> <li>• Ongoing Tax Tracking of RSUs/options</li> </ul>
PROTECTION (INSURANCE & ESTATE)	<ul style="list-style-type: none"> <li>• Benefits Review 1x</li> <li>• Estate Plan Review 1x</li> </ul>	Includes Coach Benefits + <ul style="list-style-type: none"> <li>• Attorney meeting 1-2x</li> <li>• 1-2 Private insurance set-ups</li> </ul>	Includes Director Benefits + <ul style="list-style-type: none"> <li>• Multiple attorney meetings</li> <li>• Complex insurance strategies</li> </ul>

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[Our current disclosure brochure, Form ADV Part 2, is available for your review here.](#)