



**FIREBRAND**  
WEALTH MANAGEMENT

# FINANCIAL PLANNING

## YEAR ONE AND ONGOING PRICING

COACH

**\$5,000**

Year One

\$3,000\* ongoing

BEST SUITED FOR

SINGLE CLIENTS OR  
COUPLES WITHOUT DEPENDENTS

RETIREMENT >15 YEARS AWAY  
SAVINGS STRATEGIES  
TAX PLANNING NEEDS  
RESTRICTED STOCK UNITS  
RETIREMENT PLANNING

\*BILLED AT

**\$250/MONTH OR  
\$750 PER QUARTER**

DIRECTOR

**\$7,500**

Year One

\$5,400\* ongoing

BEST SUITED FOR

CLIENTS WITH  
HIGHER COMPLEXITY

RETIREMENT <10 YEARS AWAY  
STOCK OPTIONS (ISO, NSO)  
UPCOMING LIQUIDITY EVENTS  
COMPLEX TAX / ESTATE NEEDS  
RETIREMENT PLANNING  
MULTI-GENERATIONAL PLANNING

\*BILLED AT

**\$450/MONTH OR  
\$1350 PER QUARTER**

PRODUCER

**\$10,000+**

Year One

\$7,500+\* ongoing

BEST SUITED FOR

CLIENTS WITH  
HIGHEST COMPLEXITY

RETIREMENT <10 YEARS AWAY  
MULTIPLE COMP STRUCTURES  
UPCOMING LIQUIDITY EVENTS  
COMPLEX TAX / ESTATE NEEDS  
FAMILY TRUSTS/ BUSINESSES  
RETIREMENT/INCOME PLANNING  
MULTI-GENERATIONAL PLANNING

\*BILLED AT

**\$625/MONTH OR  
\$1875 PER QUARTER**

# ONGOING FINANCIAL PLANNING

ANNUAL SERVICES	COACH	DIRECTOR	PRODUCER
PLANNING SESSIONS ALL PACKAGES INCLUDE 4 SESSIONS IN YEAR-ONE	TWO	THREE	FOUR+
CHECK-INS (30-MIN OR LESS)	THREE	FOUR+	FOUR+
INVESTMENT REBALANCE	ONE	TWO	TWO-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 Harvesting 1x</li> <li>Tax Return Review</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing Tax Planning</li> <li>Tax Harvesting 1-4x</li> <li>Tax Return Review</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</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>

All fees based on estimated hourly work billed at \$350/hour, billed in arrears.

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