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	• Q4 Tax Planning • Tax Return Review	• Q4 Tax Planning • Tax Harvesting 1x • Tax Return Review	• Ongoing Tax Planning • Tax Harvesting 1-4x • Tax Return Review
EQUITY COMPENSATION	• Annual review • Trade Strategy 1-2x	• Regular Review • Trade Strategy 4x or as needed	Includes Director Benefits + • Ongoing Tax Tracking
PROTECTION (INSURANCE & ESTATE)	• Benefits Review 1x • Estate Plan Review 1x	Includes Coach Benefits + • Attorney meeting 1-2x • 1-2 Private insurance set-ups	Includes Director Benefits + • Multiple attorney meetings • Complex insurance strategies

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

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