



FIREBRAND
WEALTH MANAGEMENT

FINANCIAL PLANNING + INVESTMENT MANAGEMENT

COACH

\$750,000

Asset Minimum

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

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
CROSS-BORDER PLANNING
MULTI-GENERATIONAL PLANNING

0.90% of Assets

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

PRODUCER

\$2,500,000

Asset Minimum

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
CROSS-BORDER 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"> • Goal-based asset allocation • Sustainable investing • Regular rebalancing • Tax-loss/gains harvesting • Cash Management • Concentrated stock mgt 	<ul style="list-style-type: none"> • Goal-based asset allocation • Sustainable investing • Regular rebalancing • Tax-loss/gains harvesting • Income strategies • Cash Management • Option overlay strategies • Concentrated stock mgt 	<ul style="list-style-type: none"> • Goal-based asset allocation • Sustainable investing • Regular rebalancing • Tax-loss/gains harvesting • Income strategies • Cash Management • Option overlay strategies • Concentrated stock mgt
PLANNING SESSIONS PLAN DEVELOPMENT & REVIEW, RETIREMENT PROJECTIONS, GOAL-SETTING AND TRACKING	TWO (Four in Year-One)	THREE (Four in Year-One)	FOUR
TAX AND/OR CROSS-BORDER PLANNING	<ul style="list-style-type: none"> • Q4 Tax Planning • Tax Return Review 	<ul style="list-style-type: none"> • Q4 Tax Planning • Tax Return Review • Coordination with CPA • Facilitate tax payments 	<ul style="list-style-type: none"> • Ongoing Tax Planning • Tax Harvesting 1-4x • Tax Return Review • Facilitate tax payments
EQUITY COMPENSATION	<ul style="list-style-type: none"> • Annual review • Trade Strategy 1-2x 	<ul style="list-style-type: none"> • Regular Review • Trade Strategy 4x or as needed 	Includes Director Benefits + <ul style="list-style-type: none"> • Ongoing Tax Tracking of RSUs/options
PROTECTION (INSURANCE & ESTATE)	<ul style="list-style-type: none"> • Benefits Review 1x • Estate Plan Review 1x 	Includes Coach Benefits + <ul style="list-style-type: none"> • Attorney meeting 1-2x • 1-2 Private insurance set-ups 	Includes Director Benefits + <ul style="list-style-type: none"> • Multiple attorney meetings • Complex insurance strategies

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