FIREBRAND
WEALTH MANAGEMENT

FINANCIAL PLANNING + INVESTMENT MANAGEMENT

COACH

$750,000

Asset Minimum

BEST SUITED FOR

CLIENTS WITH
LOWER COMPEXITY

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	• Goal-based asset allocation • Sustainable investing • Regular rebalancing • Tax-loss/gains harvesting • Cash Management • Concentrated stock mgt	• Goal-based asset allocation • Sustainable investing • Regular rebalancing • Tax-loss/gains harvesting • Income strategies • Cash Management • Option overlay strategies • Concentrated stock mgt	• 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 DEVELOMENT & REVIEW, RETIREMENT PROJECTIONS, GOAL-SETTING AND TRACKING	TWO (Four in Year-One)	THREE (Four in Year-One)	FOUR
TAX AND/OR CROSS-BORDER PLANNING	• Q4 Tax Planning • Tax Return Review	• Q4 Tax Planning • Tax Return Review • Coordination with CPA • Facilitate tax payments	• Ongoing Tax Planning • Tax Harvesting 1-4x • Tax Return Review • Facilitate tax payments
EQUITY COMPENSATION	• Annual review • Trade Strategy 1-2x	• Regular Review • Trade Strategy 4x or as needed	Includes Director Benefits + • Ongoing Tax Tracking of RSUs/options
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