



**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 QUARTERLY  
**\$1,250 YEAR ONE**  
**\$750 ONGOING**

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 INCOME PLANNING  
CROSS-BORDER PLANNING  
MULTI-GENERATIONAL PLANNING

BILLED QUARTERLY  
**\$1,875 YEAR ONE**  
**\$1,350 ONGOING**

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  
CROSS-BORDER PLANNING  
MULTI-GENERATIONAL PLANNING

BILLED QUARTERLY  
**\$2,500 YEAR ONE**  
**\$1875 ONGOING**

# 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.

Firebrand Wealth Management, LLC ("FWM"), is a registered investment adviser in the States of California, Texas, Virginia, and Washington. The adviser may not transact business in states where it is not appropriately registered, excluded or exempted from registration. Individualized responses to persons that involve either the effecting of transaction in securities, or the rendering of personalized investment advice for compensation, will not be made without registration or exemption. Registration does not imply a certain level of skill or training. "Firebrand Wealth Management" and "Firebrand Wealth" are registered trade names of Firebrand Wealth Management, LLC.

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