



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

AT CAPACITY

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"> • Q4 Tax Planning • Tax Return Review 	<ul style="list-style-type: none"> • Q4 Tax Planning • Tax Harvesting 1x • Tax Return Review 	<ul style="list-style-type: none"> • Ongoing Tax Planning • Tax Harvesting 1-4x • Tax Return Review
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
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

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.](#)