



SUMMARY OF FEES & SERVICES

\$750,000

ASSETS UNDER
MANAGEMENT

CLIENTS TYPICALLY WITH
MEDIUM COMPLEXITY
INCLUDING

- Retirement in 15+ years
- Savings strategies
- Tax planning
- RSUs/Stock Awards, ESPP
- Retirement planning
- Education planning

1.00% of Assets
(\$750,000 to \$999,999)

\$1,000,000

ASSETS UNDER
MANAGEMENT

CLIENTS TYPICALLY WITH
HIGH COMPLEXITY
INCLUDING

- Retirement in <10 years
- Multiple stock plans (RSUs, ESPP and ISOs or NSOs)
- Complex tax and estate needs
- Retirement income planning
- Cross-border planning
- Multigenerational planning

0.90% of Assets
(\$1,000,000 to \$2,499,999)

\$2,500,000

ASSETS UNDER
MANAGEMENT

CLIENTS TYPICALLY WITH
HIGHEST COMPLEXITY
INCLUDING

- Retirement in <10 years
- Upcoming liquidity events
- Complex tax and estate needs
- Family trusts and businesses
- Retirement income planning
- Cross-border planning
- Multigenerational planning

0.80% of Assets
(\$2,500,000 to \$4,999,999+)



FINANCIAL PLANNING & INVESTMENT MANAGEMENT

SERVICES	\$750,000	\$1,000,000+	\$2,500,000+
INVESTMENT MANAGEMENT	<ul style="list-style-type: none"> • Goal-based asset allocation • Sustainable investing • Regular rebalancing • Tax-loss & gain harvesting 		<ul style="list-style-type: none"> • Income strategies • Cash management • Option overlay strategies • Concentrated stock mgt
PLANNING SESSIONS* <i>PLAN DEVELOPMENT & REVIEW, RETIREMENT PROJECTIONS, GOAL-SETTING AND TRACKING</i>	TWO	THREE	FOUR
TAX PLANNING & 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 	<ul style="list-style-type: none"> • Ongoing tax planning • Tax harvesting (x1-4) • Tax return review
EQUITY COMPENSATION <i>RSUs, ISOs, NSOs</i>	<ul style="list-style-type: none"> • Annual review • Trade strategy (x1-2) 	<ul style="list-style-type: none"> • Regular review • Trade strategy (x4 or as needed) 	<ul style="list-style-type: none"> • Includes prior tier benefits • Ongoing tax tracking of RSUs and/or options
PROTECTION <i>INSURANCE & ESTATE</i>	<ul style="list-style-type: none"> • Benefits review (x1) • Estate plan review (x1) • Insurance reviews 	<ul style="list-style-type: none"> • Includes prior tier benefits • Attorney meetings (x1-2) 	<ul style="list-style-type: none"> • Includes prior tier benefits • Multiple attorney meetings • Complex insurance strategies

***All clients are offered four planning sessions in year-one, and we expect to have regular check-ins between planning sessions.**

Firebrand Wealth Management, LLC ("FWM"), is a registered investment adviser in the States of California, New York, 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](#).