

# Sibyl S. Slade, CRPC

## FINANCIAL ADVICE/PLANNING PACKAGES

### HOURLY/A LA CARTE\*\* \$200

College Savings Analysis, Death, Homeownership, Divorce, Student loan debt, debt repayment, Marriage planning, financial checkup (Minimum of 3 hours).

### FINANCIAL CONSULTING\*\* \$750-\$3,000

Deliverables: Strategic Solution & Monitoring; Client Financial Portal  
Billing Frequency – Monthly or annually.

Bronze (Annual Payment 5% discount)  
\$750 – Budget/Money Management  
1 hour strategy session, 2 hours of service for strategy design); additional person \$200

Silver (Annual Payment 8% discount)  
\$1,200 – Investment Selection, 1 hour strategy session, 2 hours of strategy design + 1 annual review; additional person \$200

Gold (Annual Payment 10% discount)  
\$2,000 – Investment Selection and Tax Savings Strategy, 2 hours of strategy sessions, 4 hours of case design + 1 annual review; additional person \$200

Platinum (Annual Payment 10% discount)  
\$3,000 – 3 Investment Selection, Tax Savings, and Insurance Planning, 3 hours of strategy session, 6 hours of case design + 1 annual review; additional person \$200

### FINANCIAL PLANNING\*\* \$2,500-\$15,000

Deliverables: Financial Plan & Monitoring; Financial Pan, Client Financial Portal  
Billing Frequency – Partial pay up front or Full pay upfront

Bronze  
\$2,500+ Individual; Couple \$3,000+

- Cash Flow Analysis
- Net Worth Statement
- Insurance Review
- Retirement Planning
- Investment Management Strategies
- RMD Calculations
- Online Access to Brokerage Account

Silver  
\$3,500+ Individual; Couple \$4,000+

- **Comprehensive Financial Plan & Annual Review**
- Cash Flow Analysis
- Net Worth Statement
- *Estate Planning Overview*
- Insurance Review
- *Long Term Care Planning*
- *Social Security Planning*
- Retirement Planning
- Investment Management Strategies
- RMD Calculations
- Online Access to Brokerage Account

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## FINANCIAL ADVICE/PLANNING PACKAGES

### FINANCIAL PLANNING\*\* \$2,500 - \$15,000 (CONTINUED)

#### Gold

\$5,500+ Individual; Couple \$6,000+; New Business plan <\$250,000 in Revenue

- *Wealthbuilding Strategies*
- *Asset Protection Strategies*
- *Comprehensive Financial Plan & Annual Review*
- *Cash Flow Analysis*
- *Net Worth Statement*
- *Estate Planning Overview*
- *Insurance Review*
- *Mortgage Review*
- *Long Term Care*
- *Social Security Planning*
- *Retirement Planning*
- ***Business Planning***
- *Access to Firm's Strategic Partners*
- *Retirement Income Distribution Strategy Modeling*
- *Investment Management Strategies*
- *RMD Calculations*
- *Investment Allocation Analysis*
- *Online Access to Brokerage Account*
- *Portfolio Rebalancing*
- *Annual Investment Meeting*
- *Education Planning*
- *Annual Credit Report Review*
- *Midyear Progress*

### FINANCIAL PLANNING\*\* \$2,500 - \$15,000 (CONTINUED)

#### Platinum

\$10,000+ Individual Business Owner or Professional; Couple \$15,000+; New Business plan >\$250,000 in Revenue

- *Wealthbuilding Strategies*
- *Asset Protection Strategies*
- *Comprehensive Financial Plan & Annual Review*
- *Cash Flow Analysis*
- *Net Worth Statement*
- *Estate Planning Overview*
- *Insurance Review*
- *Mortgage Review*
- *Long Term Care*
- *Social Security Planning*
- *Retirement Planning*
- *Business Planning*
- *Access to Firm's Strategic Partners*
- *Retirement Income Distribution Strategy Modeling*
- *Investment Management Strategies*
- *RMD Calculations*
- *Investment Allocation Analysis*
- *Online Access to Brokerage Account*
- *Portfolio Rebalancing*
- *Annual Investment Meeting*
- *Corporate Benefits Review*
- *Debt Elimination Strategies*
- *Annual Meeting with CPA*
- *Annual Meeting with Attorney*
- *Annual Meeting with CPA (Tax Planning)*
- *Annual Credit Report Review*
- *Education Planning*
- *Midyear Progress*
- *Liability & Risk Review*
- *Trust Review*
- *Charitable Planning*
- *Due Diligence Investment Selection*



INTEGRIV  
WEALTH ADVISORS

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## FINANCIAL ADVICE/PLANNING PACKAGES

### ADVISORY/ASSETS UNDER MANAGEMENT

Advisor Fee billed monthly to investment account.

1% up to \$1,000,000  
1 – 60 minute annual review meeting,  
passive portfolio management, rebalancing

.75% above \$1,000,000  
1 – 30 minute semi annual review meeting, 1  
– 60 minute annual review meeting, passive  
portfolio management, rebalancing

.75 above \$5,000,000  
3 – 30 minute quarterly review meetings, 1 –  
60 minute annual review meeting, passive  
portfolio management, rebalancing

#### NOTE

<\$500,000 in assets + \$750 Annual  
Consulting Fee includes Bronze Consulting  
Package

>\$500,000 in assets includes Gold Financial  
Plan

\*\* Additional Fees can apply due to  
complexity of the individual case.

### QUALIFIED RETIREMENT PLANS ADVISOR

Advisor Fee billed quarterly to 401(k) plans  
and Solo (K) plans

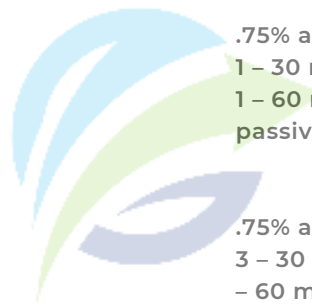
1% up to \$1,000,000 in assets.  
1 – 60 minute annual review meeting,  
passive portfolio management

.75% above \$1,000,000  
1 – 30 minute semi annual review meeting,  
1 – 60 minute annual review meeting,  
passive portfolio management

.75% above \$5,000,000  
3 – 30 minute quarterly review meetings, 1  
– 60 minute annual review meeting,  
passive portfolio management

#### NOTE

Does not include TPA and Plan Services  
Provider Fees or enrollment and education  
for employees. These fees will be made  
available with proposed plan design.



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