

WHAT WE CHARGE

The cost to create and maintain your financial plan depends on the level of complexity. The more complex your circumstances are, the more time our staff will spend working to maintain your plan. In every case, the fee is flat, transparent, and agreed upon at the onset.

Mountain

INITIAL ANALYSIS

10-20 hours

ONGOING MEETINGS

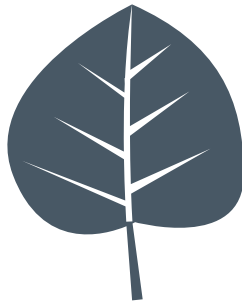
1-2 annually

ONGOING TIME SPENT

10 hours per year



\$2,400 (\$200 per month)



Aspen

INITIAL ANALYSIS

20-30 hours

ONGOING MEETINGS

2 annually

ONGOING TIME SPENT

15 hours per year

\$3,600 (\$300 per month)

Alpine

INITIAL ANALYSIS

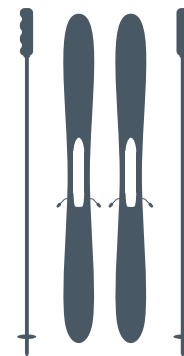
30+ hours

ONGOING MEETINGS

2+ annually

ONGOING TIME SPENT

20+ hours per year



\$4,800+ (\$400+ per month)



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