

# 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



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



## Aspen

### INITIAL ANALYSIS

20-30 hours

### ONGOING MEETINGS

2 annually

### ONGOING TIME SPENT

15 hours per year

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

## Alpine

### INITIAL ANALYSIS

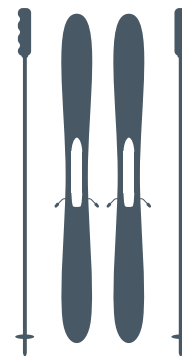
30+ hours

### ONGOING MEETINGS

2+ annually

### ONGOING TIME SPENT

20+ hours per year



**\$6,000+** (\$500+ per month)



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