

Membership Levels

Membership Level

Face to Face Meeting

Phone Meeting

DIAMOND



Every **6** Months

Every **3** Months

PLATINUM



Every **9** Months

Every **4.5** Months

GOLD



Every **12** Months

Every **6** Months

SILVER



Every **18** Months

Every **9** Months

TITANIUM



Every **24** Months

Every **12** Months

COPPER



Every **36** Months

Every **18** Months

BRONZE



Every **48** Months

Every **24** Months

COBALT



Every **60** Months

Every **30** Months

Contact us today for your Complementary Initial Interview

One Time Initial Set Up Investment \$1,500 includes:

- | | |
|--|---|
| <p>1 3 Meetings</p> <ul style="list-style-type: none"> ➤ Plan Presentation ➤ Plan Implementation ➤ Plan Review | <p>2 WorkOptional Personal Financial Website</p> <p>3 Set up of Online Portal & Secure Vault</p> <p>4 Morningstar Portal</p> |
|--|---|

WEALTH MANAGEMENT

(Includes Portfolio Management)

\$ 500K - 1.5M	1.5%
\$ 1.5M - 5M	1.25%
\$ 5M - 10M	1%
\$ 10M - 25M	.75%
\$ 25M +	.50%

PORTFOLIO MANAGEMENT

(Only)

\$ 500K - 1.5M	.75%
\$ 1.5M - 5M	.625%
\$ 5M - 10M	.50%
\$ 10M - 25M	.375%
\$ 25M +	.25%