

Financial Planning Services:

The fee for a customized, comprehensive financial plan is predicated upon the facts known at the start of the engagement. Many financial planning projects fall within a range of \$1,200 to \$2,000. The minimum fee is \$1,000. All prospective clients are given an exact quote for financial planning services at the end of the initial meeting. One-half of the fee for a financial plan will be waived for clients who opt to engage Newcomb Financial Advisors, LLC for investment management services.

Investment Management Services:

Investment management fees are billed as a percentage of assets under management on a quarterly basis as follows:

Assets Under Management	Annual Fee
\$0 to \$250,000	1.00%
\$250,001 to \$500,000	0.85%
\$500,001 to \$1,000,000	0.70%
Above \$1,000,000	0.60%

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