Greater Gifts
Family Office

How to Calculate your Quarterly Fee:
a Flow Chart

Will we be managing $1 Million or more in investable assets?

→ Yes → **Will we manage more than $3 Million?**

→ Yes → **Will we manage more than $5M?**

→ Yes → **Will we manage more than $10M?**

→ Yes → **Minimum $12,250**

No ↓ **Multiply the amount by 0.0090, then divide by 4**

No ↓ **Subtract $1M from the amount. Multiple that number by 0.0075 and add 9000, then divide by 4**

No ↓ **Subtract $3M from the amount. Multiply that number by 0.0050 and add 24000, then divide by 4**

No ↓ **Subtract $5M from the amount. Multiply that number by 0.0030 and add 34000, then divide by 4**

→ **Are ongoing financial and life planning included?**

→ **YES!!!**

→ **Call or email our office!**
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