Greater Gifts
Family Office

One-time Financial Planning Fee: based upon anticipated number of hours to complete. Calculated after our consultation meeting and presented to you in writing in the Letter of Engagement and Financial Planning Agreement. $500 down payment will be required with your signed LOE and FPA.

Ongoing Financial Planning: no charge for Advisory clients

Advisory Fees

Managed Asset Range		Annual Rate
On the first $1 million	$0-1M	90 basis points (bps) = 0.90% or 0.0090
On the next $2 million	$1-3M	75 bps
On the next $2 million	$3-5M	50 bps
On the next $5 million	$5-10M	30 bps
Over $10 million	Over $10M	Negotiable

Fees will include: ongoing Investment Management, Tax Planning, Estate Planning, Risk Management (Insurance Review), Spiritual Direction, Financial Therapy, Vocational Coaching, Financial Literacy Training (adults/children), Video Time Capsule, and multiple meetings with an Advisor throughout the year.