

# ONGOING FINANCIAL PLANNING

#### **BASE MONTHLY FEE**

Dentist \$200 Student/Resident \$50



#### ADD COMPLEXITY ADJUSTMENTS

Married + \$100 Practice Owner + \$100



#### ADD HOUSEHOLD INCOME ADJUSTMENTS

\$0 - \$250,000 + \$0 \$250,001 - \$500,000 + \$50 \$500,001 + + \$100



### **ADD NET WORTH ADJUSTMENTS**

## **Example Monthly Fees:**

Married Student, \$50,000 Income, \$0 Net Worth = \$50

 $\widehat{\mathbb{W}}$  Single Dentist, Practice Owner, \$300,000 Income, \$200,000 Net Worth = \$350

 $\square$  Single Dentist, \$200,000 Income, \$750,000 Net Worth = \$300

₩ Single Dentist, Practice Owner, \$350,000 Income, \$800,000 Net Worth = \$450

Married Dentist, Practice Owner, \$550,000 Income, \$1,500,000 Net Worth = \$700