

ONGOING FINANCIAL PLANNING

BASE MONTHLY FEE

Dentist \$300 Student/Resident \$50



ADD COMPLEXITY ADJUSTMENTS

Married + \$100 Practice Owner + \$100 Student Loans + \$50



ADD HOUSEHOLD INCOME ADJUSTMENTS

\$0 - \$500,000 + \$0 \$500,000 - \$1,000,000 + \$100 \$1,000,000 + + \$200



ADD NET WORTH ADJUSTMENTS

\$0 - \$500,000 + \$0 \$500,000 - \$1,000,000 + \$125 \$1,000,000 - \$3,000,000 + \$250 \$3,000,000 + \$375

Example Monthly Fees:

Married Student, \$50,000 Income, \$0 Net Worth = \$150

 \widehat{W} Single Dentist, \$200,000 Income, \$750,000 Net Worth = \$425

₩ Single Dentist, Practice Owner, \$350,000 Income, \$800,000 Net Worth = \$525

 \widehat{W} Married Dentist, Student Loans, \$200,000 Income, \$800,000 Net Worth = \$575

Married Dentist, Practice Owner, \$550,000 Income, \$1,500,000 Net Worth = \$850