



Soaring Wealth LLC

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2023 Financial Planning Packages

| Planning Package | Hourly Planning: Comprehensive Plans or Limited Engagements | Full Services: Retiree Wealth |
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| Core Services | <ul style="list-style-type: none">· Financial Planning· Investment Guidance (high level only)· Tax Planning | <ul style="list-style-type: none">· Financial Planning· Portfolio Management· Tax Planning· Tax Preparation |
| Typical Life Stage | Anyone | Retirees |
| General Focus | <ul style="list-style-type: none">· Financial planning fundamentals· Further depth and/or additional topics per mutual agreement | Long-term retirement and estate planning |
| Scheduled Meetings | Ad hoc, upon mutual availability | Two annual meetings: Spring & Year End |
| Minimum Fee | <p>\$350 / hour; \$300 / hour over 10 hours</p> <p>Minimum engagement: 4 hours</p> <p><u>For complex situations: *</u> \$450 / hour; \$400 / hour over 20 hours</p> <p>Minimum engagement: 8 hours</p> | <p>\$12,500 / year \$3,125 / quarter</p> <p><u>Fee calculation:</u> 1.25% of first \$1 million assets managed; 0.50% thereafter</p> |
| * Complex Situations Include: | Equity compensation (RSUs, ISOs, NQSOs, etc.) Cross-border situations Trusts and business entities | |