

ADVICE-BASED RELATIONSHIP SERVICES

SILVER

\$1,800 - \$3,000

INCLUDES

- ✓ Cash Flow & Budgeting
- ✓ Align values, goals & behaviors

KEY FOCUS AREAS

- ✓ Financial education
- ✓ Debt & credit management
- ✓ Building a cash reserve
- ✓ Employee benefits
- ✓ Basic estate review

REVIEW SESSION FREQUENCY

- ✓ Semi-Annual

GOLD

\$3,000 - \$6,000

INCLUDES

- ✓ Silver Financial Planning

KEY FOCUS AREAS

- ✓ Education planning
- ✓ Home purchase planning
- ✓ Retirement distribution planning
- ✓ Meetings with CPA/Attorney

REVIEW SESSION FREQUENCY

- ✓ Quarterly

PLATINUM

\$6,000 - \$20,000

INCLUDES

- ✓ Gold Financial Planning

KEY FOCUS AREAS

- ✓ Advanced tax & estate strategies
- ✓ Employee stock options & grants
- ✓ Future inheritance/windfall planning
- ✓ Estate Planning*
- ✓ Business Owner strategies

REVIEW SESSION FREQUENCY

- ✓ Monthly

DIAMOND

\$20,000 +

INCLUDES

- ✓ Platinum Financial Planning
- ✓ Customized for families/businesses

KEY FOCUS AREAS

- ✓ Complex Protection/Insurance
- ✓ Complex cash flow management
- ✓ Complex income distribution
- ✓ Complex investment strategies
- ✓ Complex estate planning strategies

REVIEW SESSION FREQUENCY

- ✓ Monthly or as needed

MONEY SESSIONS

DISCOVERY SESSION



- ✓ 15 minutes
- ✓ Establish goals
- ✓ Review planning process
- ✓ Register for custom tools

STRATEGY & ACTION SESSIONS



- ✓ 60 minutes (up to 5 sessions)
- ✓ Refine goals
- ✓ Propose solutions
- ✓ Answer your questions
- ✓ Build your financial literacy
- ✓ Take action

REVIEW SESSIONS



- ✓ 45 minutes
- ✓ Implement advice
- ✓ Review progress
- ✓ Integrate life's changes
- ✓ Coordinate your financial team
- ✓ Keep you on track

BUSINESS OWNER



KEY FOCUS AREAS

- ✓ Cash flow & profit optimization
- ✓ Employee benefits offering
- ✓ Business succession planning
- ✓ Employee compensation
- ✓ Small business retirement plans

REVIEW MEETING FREQUENCY

- ✓ Monthly



*Annual financial advisory fees may be paid on a monthly or quarterly basis. Working with an advisor is not a guarantee of future financial results. Investors should conduct their own evaluation of a financial advisor. Advisory services are made available through Money Script Wealth Management, PLLC, a registered investment adviser. Estate Planning Services may be included in Platinum and Diamond Advisory relationships. © 2023

INVESTMENT ADVISORY SERVICES

At Money Script Wealth Management, we provide tailored wealth management services to align with your financial goals. As fiduciaries, we prioritize education, expert guidance, and flexible solutions. Through Altruist and Charles Schwab, clients can choose their level of involvement in investment decisions, with portfolios designed for discretionary or non-discretionary authority.

Asset Management Fees	
Assets Under Management	Annual Fee
\$0 - \$500,000	1.00%
\$500,001 - \$1,000,000	0.95%
\$1,000,001 - \$2,500,000	0.90%
\$2,500,001 - \$5,000,000	0.85%
\$2,500,001 - \$5,000,000	0.75%



charles SCHWAB

ESTATE PLANNING SERVICES

We also coordinate estate planning, including trusts, wills, and powers of attorney, efficiently and cost-effectively, in collaboration with leading professionals. While ideal for most clients, complex situations like disinheritance or litigation risks may require specialized attorneys, to whom we can refer you. Estate planning fees are separate from ongoing advisory services.

The fees associated with estate planning related services are separate and in addition to your ongoing financial planning or advisory fees.

ESTATE PLANNING SERVICES

\$550 - \$2,500

INCLUDES

- ✓ Trust (if needed)
- ✓ Certification of Trust
- ✓ General Transfer
- ✓ Financial Power of Attorney
- ✓ Medical Power of Attorney
- ✓ Advanced Health Care Directive
- ✓ HIPAA Release
- ✓ Will
- ✓ Property Agreement
- ✓ Deed(s)*

Recording each property deed is an additional \$300 - \$500 and includes county recorder fees.



Investment Advisory fees are billed monthly in arrears and may vary based on factors like scope, complexity, assets, and client engagement. These fees are negotiable at our discretion. Estate Planning services are offered through EncorEstate Planning & Trust & Will. For details, please review the Investment Advisory disclosures. © 2023