



Fee Schedule for Financial Services

As a fee-only company, Financial Connections Group, Inc. receives no sales commissions, referral fees, or other compensation. As an independent advisor registered with the Securities and Exchange Commission, Financial Connections is not affiliated with any brokerage firm. Client investment accounts are held at TD Ameritrade Institutional, a discount brokerage firm.

Services offered by Financial Connections include:

- ❖ Financial Planning: help you identify your short and long-term goals, and design a plan to connect your finances with your future
- ❖ Implementation Assistance: help you implement the next steps of your financial plan
- ❖ Investment Management: your choice of a customized portfolio or an automated investment experience
- ❖ Concierge Planning: our most comprehensive planning
- ❖ Retirement Navigator: coaching workshop to help you plan the next stage of life

INVESTMENT MANAGEMENT FEE STRUCTURE	
Management Services	Current Annual Management Fee
Customized Portfolio*	0.75% of Assets Under Management
FC Digital**	0.50% of Assets Under Management

*Customized Portfolio management account minimum \$750,000.

**FC Digital account minimum \$10,000.

PLANNING SERVICES	
Services	Rate
Project Financial Planning	\$275.00 per hour
Concierge Financial Planning	Fixed Fee – TBD ¹
Implementation Assistance	Fixed Fee – TBD ¹
Retirement Navigator / Coaching ² Two 60-90 minute or one 3 hour workshop	\$450.00 per person

¹Fee based on complexity.

²Discount available for groups of four or more.