



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
- ❖ Investment Management: your choice of a customized portfolio or an automated investment experience

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
Held-Away Assets	0.75% of Assets Under Management

*Customized Portfolio management account minimum \$400,000.

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

FINANCIAL PLANNING SERVICES	
Services	Rate
Project-based Financial Planning	\$350 per hour
Subscription-based Financial Planning	Starts at \$350 per quarter ¹

¹Depending upon complexity, fees can range up to \$1,500 per quarter.