

LANDMARK FINANCIAL PLANNING, LLC



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*Schedule of Typical Services*

As of 3/27/2009

**Initial Meeting**:.....**No charge, no obligation**

**Financial Planning “Check-up”**:.....**\$300**

A check-up is our building block offering and prerequisite for additional projects/engagements detailed subsequently. Ideal for the do-it-yourselfer, wanting a quick second opinion, or those just beginning to sketch out their financial roadmap, our check-up will briefly touch all the components of a well-rounded financial and risk-management plan, identifying strengths and weaknesses that can addressed now or in the future, as you see fit.

- ▲ Provides a broad review of your financial situation, identifying strengths, along with specific recommendations for weak points.
- ▲ A one hour interactive meeting is basis for recommendations, along with general financial data provided (i.e. 401k/IRA statements, insurance declaration pages, etc) with a follow-up, written discussion summary and recommendations.
- ▲ Identifies an appropriate basic target asset allocation according to your risk tolerance, retirement savings target and plan to achieve that target, simple insurance coverage review, and debt issues. Selection of specific individual securities, held through an employer plan or individually, is not covered.

**Custom Financial Plans**:.....**Combined with the “Check-up”**

While this is by no means a comprehensive list, most persons should be able to obtain the advice they seek from the topics below, combined with the check-up meetings. In some cases, more interactive time may be required. Examples include:

- |   |                                       |
|---|---------------------------------------|
| ▲ Spending Plan/Cash-flow Planning \$125  | ▲ Auto Insurance Review \$62.50       |
| ▲ Investment Planning \$250               | ▲ Disability Insurance Review \$62.50 |
| ▲ Retirement Goals Planning/Testing \$250 | ▲ Long-term Care Insurance \$125      |
| ▲ Tax Planning \$62.50                    | ▲ Life Insurance Needs Planning \$125 |
| ▲ Homeowners Insurance Review \$62.50     | ▲ Self-employment Planning \$125      |

- ▲ Special Needs Planning \$125
- ▲ Estate Planning Review \$250
- ▲ College Savings Planning \$250
- ▲ Planning Meetings \$125
- ▲ Presentation Meetings \$125
- ▲ Mortgage Needs Analysis \$62.50
- ▲ Credit Report Analysis \$62.50

Some common combinations of plans include:

**First-time Homebuyer Special.....\$300**

- ◆ For those considering purchasing their first home and desiring coaching on the financial aspects of ownership, or who already have and are considering a refinance. Combines Homeowner Insurance Review, Mortgage Needs and Credit Report Analysis with Spending Plan/Cash-flow Planning at a lower bundled price.

**Investment Plan.....\$375**

- ◆ Investment Planning with Presentation meeting, builds upon basic asset allocation identified in the Financial “Check-up” and makes specific recommendations on ordering your investment accounts and specific selections.

**Retirement Portfolio Plan.....\$625**

- ◆ Combines the services rendered in the Investment Plan with Retirement Goals Planning/Testing with a Presentation meeting, measures progress toward achieving retirement goals and likelihood of success using Monte Carlo analysis.

*All of Landmark’s projects/engagements are based on an hourly rate of \$125 and are quoted in advance as a flat fee, within a range, based on estimates of the time involved. If, for any reason, an initial quote proves inaccurate for the time required, Landmark will notify you and await instruction before proceeding.*

Note: This document is for general reference and discussion only. Actual fee estimates may differ due to specific client information/requirements. This document does not constitute a formal fee quote, and is not a contractual agreement implying a commitment of any kind. A signed and dated Client Service Agreement is the official source of fee quotes and the only offer of service. Landmark Financial Planning, LLC does not provide tax insurance or legal advice and only discusses these issues as they relate to your financial plan. Further advice should be sought from the appropriate professional(s) for tax, insurance and legal advice.