

# Edgecombe & Coplin Wealth Strategies, LLC

## PLANNING FEE SCHEDULE

(All fees waived for current investment clients)

### ESTATE PLANNING

Minimum Fee: \$3,500 for up to \$10,000,000 Estate  
Above \$10,000,000 Estate - .035% of Gross Estate (Negotiable)

### RETIREMENT PLANNING

Minimum Fee: \$500

### INSURANCE PLANNING

Minimum Fee: \$500

### BUSINESS SUCCESSION PLANNING

Minimum Fee: \$1,000 for up to two owners  
Each additional owner: \$400 (Negotiable)

### FINANCIAL PLANNING

Minimum Fee: \$1,500  
Can include Retirement, Insurance, College and Investment Planning

### INVESTMENT PLANNING

Minimum Fee: \$500 for up to \$500,000 of assets  
Above \$500,000 - .10% of Gross Assets (Negotiable)

### **All Planning Fees include the following:**

Complete Printed Bound Plan  
Two Adjustments Annually  
Unlimited Meetings during next 12 Months  
Unlimited Phone Calls during next 12 months

### PLAN TIME EXTENSIONS:

Annual renewals beyond the first 12 months are negotiable and will range between 25% -100% of the first year planning fee. The fee is determined by how much, if any, additional work will need to be done in subsequent years.

### HOURLY FEE: \$250.00

Effective 8/14/2017