FEE COMPLEXITY WORKSHEET

Client Name(s): ______________________________ Date: ______________

Client Situation	Low (1 pt)	Medium (2 pt)	High (3 pt)
Marital Status	Single/Married	Blended Family, Planning for only 1 member	Large Age Difference
Dependents	N/A	Legal Dependants	Special Needs/ Blended Family
Net Worth	<$1,000,000	$1,000,000 - $2,000,000	>$2,000,000
Investable Assets	<$500,000	$500,000 - $1,000,000	>$1,000,000
Accounts (#Locations)	1-2	3-5	6+
Income	<$150,000	$150,000 - $250,000	>$250,000
Income Sources	W-2, Social Security	Pension, Investment Income	Self-Employed, Trusts
Cash Flow Systems	Consistent Cash Flow	W2 and 1099	Variable Income, Bonus, Inconsistent Income
Tax Preparation	Self-Prepared Returns	Works with Enrolled Agent	Works with CPA
Outside Professional Involvement (i.e. CPA, Attorney)	None	1	2+
Investment Real Estate	None	1	2+
Liabilities	Mortgage Only	Student Loans	Personal Loans, Credit Card(s)
Policies	Term Policies, Employer-Provided	Whole Life, UL, LTC	VUL, IUL, Business Inc.

Areas of Focus	Low	Medium	High
Retirement	Accumulation	Retired	Transitioning to Retirement
Education Goals	None	1-2	3+
# Other Goals	None	1-2	3+

Additional Planning Complexities - Add 2 Points for any of the following:	
Business Owner	BOLI
Equity Based Compensation	

Other Notes / Comments Pertinent to Fee:

TOTAL SCORE: ___________

	Low (16-20)	Medium (21-34)	High (35+)
One Time Planning Fee	$1,500-$2,500	$2,500-$3,500	$3,500 - $5,000

**Your One-TIme Planning fee includes your Financial Plan, Executive Summary, and Implementation Schedule and non-material plan changes. Upon plan completion, your monthly subscription fee will begin.*

PLANNING FEE: ___________ FEE VALID UNTIL: ___________ FPE COMPLETED ON: ___________