

Toler Financial Group

Advisory Services Fee Schedule

Comprehensive Financial Planning: \$3000 upfront

Fee adjusted as needed for plan complexity

Initial setup - Typically covers 4-5 meetings

Includes financial goals, insurance analysis, investment plan

Continuing financial planning: \$150-\$250/month

For clients seeking ongoing planning

Meetings 2-4 times per year

Investment Management: small monthly fee from accounts

Approximate fee is 1% of assets

Based on total assets of household

Assets over \$1M have a lower fee

Assets under \$250,000 have a slightly higher fee (1-1.25%)



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