



**Addendum**

**Financial Planning/Investment Consultation/Workshop Services**

Cash Flow/Spending Plan	College Financing
Debt Management	Estate Planning Strategies
Employee Benefits	Major Purchase(s)
Retirement Planning	Annual Review (Hourly As-needed Consultation Only)
Investment Consultation	Others:
Risk Management	Others:
Tax Planning Strategies	Others:

\_\_\_\_ **Hourly As-Needed Consultation (Real-Time Planning)** – Hourly services fees are based on a rate of \$220 per hour. Additional time after the scheduled hour will be billed in fifteen-minute (15-minute) increments, and a partial increment will be treated as a whole. An initial deposit of \$50 is due during appointment scheduling.

\_\_\_\_ **Fixed Fees (Holistic Financial Planning)** – The Firm’s financial planning and investment consultation services under this engagement are assessed at a fixed fee from \$720, determined by (1) the information supplied by Client from client questionnaire and data aggregation account at the time of first submission and during annual updates and (2) the number of sessions needed based on project complexity. The Client fee for the holistic planning is \$\_\_\_\_\_ for a total of \_\_\_\_\_ sessions. The quote is valid for 60 days thereafter.

\_\_\_\_ **Fixed Fees (Workshops)** – The Firm will assess a fixed fee for its educational workshops ranging from \$25 to \$200 per attendee for each workshop session, depending on the length of the event, its location, and the content to be presented. For workshops that cannot guarantee the number of attendee, the Firm assess an hourly rate of \$220 per hour for the time to travel, prepare, and conduct the workshop. The Client fee for the holistic planning will be supplied by a separate addendum pending receipt of the aforementioned information. An initial deposit of one-half and no more than \$500 of total workshop fee is due upon signing of this Agreement.

**The Client acknowledges that this Addendum may represent an amendment to the Client Services Engagement Agreement (Agreement) signed on \_\_\_\_\_ (month) \_\_\_\_ (day), \_\_\_\_\_ (year) and that all other terms and conditions of the original Agreement shall remain in full force and effect.**

\_\_\_\_\_  
 Client (1) Signature | Client (2) Signature | Date

\_\_\_\_\_  
 Print Client (1) Name | Print Client (2) Name

By: \_\_\_\_\_  
 Wan McCormick, Managing Member | Date