RELIABLE ALLIANCE FINANCIAL
Your partner in success

Addendum

Financial Planning/Investment Consultation/Workshop Services

	Cash Flow/Spending Plan		College Financing
	Debt Management		Estate Planning
	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 $250 per hour, including the time for data review and report preparation. 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 $900, determined by (1) the information supplied by Client from client questionnaire and/or data aggregation account at the time of submission 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 $50 to $300 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 $250 per hour for the time to travel, prepare, and conduct the workshop. An initial deposit of one-half and no more than $500 of total workshop fee is due upon signing of this Agreement.

Payment of Fees. The Firm will invoice the Client for fees payable. Payment is due upon receipt of invoice. Non-continuous service engagements that are greater than one month in duration will be billed monthly, in arrears. Interest at 10% per year will be assessed on balances more than 60 days past due.

_____ | _____ | _____
Client (1) Signature | Client (2) Signature | Date

_____ | _____
Print Client (1) Name | Print Client (2) Name

By: _____ | _____
Wan McCormick, Managing Member | Date