Professional Services *Fee Schedule*

Kaplan Financial Group, LLC provides a wide selection of advisory and planning services personally tailored to the needs of our clients.

Financial Planning Analysis

- A mutually agreed upon fee of $1,000-$10,000 will be charged for a full analysis based on the complexity of financial situation.

- A mutually agreed upon fee of $500-$5,000 will be charged for a full update analysis based on the complexity of financial situation and/or significance of changes to financial situation since the original plan.

As a part of the financial planning analysis, consultations and client reviews are complimentary and a part of our regular service schedule unless otherwise mutually agreed upon.

Project Work

If the comprehensive financial plan is not chosen, Kaplan Financial Group, LLC is pleased to work directly with clients on a project basis concerning specific issues including, but not limited to, the following:

- Financial Statements
- Retirement Income Planning
- Education Funding
- Investment Planning
- Risk Management
- Charitable Gifting

- Estate Planning
- Business Planning
- Contract Negotiation work
- Divorce Planning
- Other Project Work

Securities and advisory services offered through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Advisor.

Basic hourly rates for services provided by Kaplan Financial Group, LLC are $150-$400 per hour.

Administrative time is billed at $75 per hour.

Expenses for telephone, mail, courier, copies, facsimile, travel, and other out of pocket expenses may be billed as incurred.

Kaplan Financial Group, LLC
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