

## FINANCIAL WELLNESS MEMBERSHIP OPTIONS

(SERVICES AVAILABLE UPON REQUEST TO ELEGIBLE MEMBERS)

	DIY	Journey	VIP	VIP+
<b>Membership Fee for Retail Clients</b>	<b>\$50 /MO</b> or \$300 /YR	<b>\$83 /MO</b> or \$498 /YR	<b>\$400 /MO</b>	<b>n/a</b>
<b>Membership Fee for Eligible Group Participants</b>	<b>As low as \$0 /MO</b>	<b>As low as \$0 /MO</b>	<b>\$300 /MO</b>	<b>n/a</b>
<b>Finique 360 Assets Required for Fee-waiver</b>	<b>\$50,000</b>	<b>\$200,000</b>	<b>\$1 million</b>	<b>\$10 million</b>
Milestones & phases (MAPs) financial planning	\$200 /MO	\$100 /MO	X	X
One-time "Enchante" introductory session (up to 1 hour)	X	X	X	X
Financial organization portal	X	X	X	X
Financial planning calculators	X	X	X	X
Personal financial statement calculators	X	X	X	X
25-min pit-stop live session slots (per year)	2@ \$50 /slot	2	4	8
Assigned financial advocate & solutions concierge		X	X	X
Unlimited Q&A messaging		X	X	X
One-time financial observations & roadmap session (up to 2 hours)		X	X	X
Crisis or change navigation sessions (per qualifying life event)		1	4	Unlimited
Waived-fee membership for immediate family (parents & children)		2 x DIY	JOURNEY	VIP
Big-ticket spending concierge			X	X
Planned giving philanthropic consulting			X	X
Customized full-day live annual sessions				X
Managed organizational portal				X
Asset protection with estate & legacy strategy consulting				X
Family office set-up & operations consulting				X
Other out-of-scope hourly work	\$200 /HR	\$200 /HR	\$200 /HR	\$200 /HR



See firm ADV Part 2A brochure for more details.