SCHEDULE A

Services to be performed by the Planner for the Client are as follows:

	Include
Cash Flow and Net Worth Statement	_____
Goal Setting	_____
Risk Tolerance Analysis	_____
Investment	
Review of current allocation	_____
Proposed asset allocation	_____
Retirement	
Needs analysis	_____
Asset Projections	_____
Monte Carlo Analysis	_____
Retirement Plan Analysis	
401(k) Asset Allocation	_____
IRA/Roth IRA Analysis	_____
SIMPLE/SEP/Keogh Analysis	_____
Portfolio Analysis	
Review of current portfolio	_____
Proposed portfolio	_____
Investment Policy Statement	_____
Insurance	
Life Insurance Analysis	_____
Disability Analysis	_____
Home, Auto and Health Analysis	_____
Long Term Care Analysis	_____
Income Tax Analysis	_____
Tax Preparation	_____
Estate Planning	_____
Education Funding Analysis	_____
Other	_____

Fixed Fee: $_____*

Hourly Fee: $_____*

Estimated Fee: $_____*

Additional Terms/Conditions:_____

_____

_____

_____

Client: _____ *Date*_____

The Planner shall provide only the services initialed above by the Client.

* Payable: $_____ upon engagement

$_____ upon completion