



POINTER CREEK

WEALTH MANAGEMENT

SEE THE UNSEEN

	POINTS			
	1	2	3	4
Gross Estate	< \$1,000,000	\$1,000,000 to \$5,700,000	\$5,700,000 to \$11,400,000	\$11,400,000 +
Income	S < \$122,000 M < \$193,000	S \$122,001 to \$160,725 M \$193,001 to \$321,450	S \$160,725 to \$510,300 M \$321,450 to \$612,350	S \$510,300 + M \$612,350 +
Source of Income	◦ W-2 Only	◦ Multi-Source ◦ 1099	◦ Schedule C ◦ Sub S Election	◦ Foreign Trust ◦ Deferred Comp ◦ Real Estate ◦ Stock Options
Types of Assets	◦ Cash ◦ Banking Accounts Only	◦ Mutual Funds ◦ Fixed Income ◦ Securities ◦ IRA's ◦ 401(k)'s	◦ Individual Securities ◦ Managed Accounts ◦ Sole Proprietorship ◦ Simple Partnership	◦ Limited Partnership ◦ REIT ◦ LLC ◦ FLP ◦ Investment Real Estate ◦ Illiquid Investments
Ownership	◦ Individual ◦ JTWR0S ◦ Tenants by Entirety	◦ Tenants in Common ◦ Community Property ◦ UGMA ◦ UTMA	◦ Trust(s)	◦ Business Entity
Family Status	◦ Single	◦ Married	◦ Divorce ◦ Re-Marriage	◦ Domestic ◦ Non-Citizens
Years to Goal	10 + Years	6-10 Years	2-5 Years	1 or Less
Scenarios or Objectives	1 to 3	4 to 5	6 to 7	8 +
Scenarios	These add or stand alone at 1-4 points each, based on unique complexity. ◦ Alimony ◦ Child Support ◦ Disability Pension ◦ Early Retirement ◦ Death of Partner ◦ Pre or Post Nuptial Agreement ◦ Chronic or Terminal Illness ◦ Oil & Gas Lease ◦ Special Needs Child or Parent ◦ Business Succession Planning ◦ Career Transition ◦ Residency to Practice ◦ Job Offer & Cost of Living Comparison			

Scoring Range	Service	Planning Fee Range
1 to 10 Points	Basic (Starter) Plan	Min \$750 - Max \$1,250
11 to 20 Points	Mid (Focused) Plan	Min \$1,250 - Max \$2,250
21 to 30 Points	Full (Comprehensive) Plan	Min \$2,250 - Max \$5,000
Above 30 Points	Custom (CFO Service) Plan	Custom (\$5,000 minimum)

Planning Engagement for: _____ Estimated Fee Range: _____
 By: _____ Date: _____

*This pricing matrix is intended to clarify and accompany Financial Planning Engagement paperwork (FPE 10- 05 -17).