



# POINTER CREEK WEALTH MANAGEMENT

SEE THE UNSEEN

	1	2	3	4
<b>Gross Estate</b>	< \$1,000,000	\$1,000,000 to \$6,460,000	\$6,460,000 to \$12,920,000	\$12,920,000 +
<b>Income</b>	Single <\$138,000 or Married <\$218,000	Single within \$138,000 bracket or Married within \$218,000 bracket	Single within \$153,000 bracket or Married within \$228,000 bracket	Single above \$153,000 or Married above \$228,000
<b>Income Sources</b>	W-2 Only	Multi-source 1099	Schedule C Sub-S Election	Foreign Trust Deferred Comp Real Estate Stock Options
<b>Assets Held</b>	Cash/Bank Accts Only	Mutual Funds ETF's Annuities	Indiv. Securities Managed Accts	Ltd Partnerships REITs LLCs Investment Real Est Illiquid Investments
<b>Ownership</b>	Individual JTWROS Tenants by Entirety	Tenants in Common Community Property UGMAs / UTMAs	Revocable Trust(s) Irrevocable Trust(s)	Business Entities Family Ltd Partnerships
<b>Family Status</b>	Single	Married	Separated Divorced Remarried	Non-US Citizen Dual Citizenship Prior Foreign Citizen
<b>Years to Goal</b>	10+ years	6-10 years	2-5 years	1 or less
<b>Scenarios</b>	1 to 3	4 to 5	6 to 7	8+
<b>Scenarios</b>	<b>The following scenarios add 1-5 points each, based on unique complexity.</b> <input type="checkbox"/> Alimony/Child support <input type="checkbox"/> Disability Benefits/Pension <input type="checkbox"/> Pre-59 ½ Retirement <input type="checkbox"/> Death of a Partner <input type="checkbox"/> Pre/Post Nuptial Agreement(s) <input type="checkbox"/> Chronic/Terminal Illness <input type="checkbox"/> Mineral Rights Planning <input type="checkbox"/> Special Needs Dependent <input type="checkbox"/> Business Succession Planning <input type="checkbox"/> Career Transition Planning <input type="checkbox"/> Residency-to-Practice <input type="checkbox"/> Employment Offer Comparison <input type="checkbox"/> Estate Settlement			

Total Points/Complexity	Planning Package Offered	Planning Fee Range
Up to 10 points	Basic: Starter Plan	Min \$1,250 – Max \$1,750
11 to 20 points	Mid: Focused Plan	Min \$1,750 – Max \$2,750
21 to 30 points	Full: Comprehensive Plan	Min \$2,750 – Max \$ 5,000
Above 30 points	Custom: CFO Service Plan	Custom pricing \$5,000 min

Estimated Points/Fee Range: \_\_\_\_\_/\_\_\_\_\_

Final Fee: \_\_\_\_\_

Offered by: \_\_\_\_\_

Date: \_\_\_\_\_

Accepted by: \_\_\_\_\_

Date: \_\_\_\_\_