



POINTER CREEK

WEALTH MANAGEMENT

SEE THE UNSEEN

	1	2	3	4
Gross Estate	< \$1,000,000	\$1,000,000 to \$5,850,000	\$5,850,000 to \$11,700,000	\$11,700,000 +
Income	Single <\$125,000 or Married <\$198,000	Single within \$164,925 bracket or Married within \$329,850 bracket	Single within \$523,600 bracket or Married within \$628,300 bracket	Single above \$523,601 or Married above \$628,301
Income Sources	W-2 Only	Multi-source 1099	Schedule C Sub-S Election	Foreign Trust Deferred Comp Real Estate Stock Options
Assets Held	Cash Bank Accts Only	Mutual Funds Fixed Income ETF's IRA's 401(k)'s	Indiv. Securities Managed Accts	Ltd Partnerships REITs LLCs Investment Real Est Illiquid Investments
Ownership	Individual JTWROS Tenants by Entirety	Tenants in Common Community Prop. UGMAs UTMAs	Trust(s)	Business Entity
Family Status	Single	Married	Separated Divorced Remarried	Non-US Citizen Dual Citizenship Prior Foreign Citizen
Years to Goal	10+ years	6-10 years	2-5 years	1 or less
Scenarios	1 to 3	4 to 5	6 to 7	8+
Scenarios	The following scenarios add or stand alone at 1-4 points each, based on unique complexity. <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 \$950 - Max \$1,500
11 to 20 points	Mid: Focused Plan	Min \$1,500 - Max \$2,500
21 to 30 points	Full: Comprehensive Plan	Min \$2,500 - Max \$ 5,000
Above 30 points	Custom: CFO Service Plan	Custom pricing \$5,000 min

Estimated Points/Fee: _____

Final Fee: _____

Offered by: _____

Date: _____

Accepted by: _____

Date: _____