PLANCORR WEALTH MANAGEMENT, LLC

Retirement Income and Estate Planning Services offered through
Plancorr Wealth Management, LLC Registered Investment Advisor.

Financial Planning Services

Pathways to Financial Independence™ – This is a flat fee of $350, to include up to a 1.5-hour (maximum) financial consultation:

This service lays the foundation for becoming financially independent. The services offered are as follows:

- Budget/cash-flow review
- Debt reduction strategies
- Net worth analysis

The fee includes a hard copy report of the recommendations made.

Debt Reduction Strategies – This is a flat fee of $199, to include up to a 1-hour (maximum) consultation:

This service is for individuals who are current with their debt (House, Autos, Credit Cards and Student Loans), but who seek to pay it off as quickly as possible in order to save thousands of dollars in debt service charges and expenses. This program is not a credit counseling, bill consolidation, credit negotiation, credit repair or third party bill payer program. The services offered are as follows:

- Mortgage repayment plan
- Student loan repayment plan
- Credit Card repayment plan
- Auto loan repayment plan

The fee includes a hard copy report of the recommendations made.

Financial Planning Services

Asset Protection Review – This is a flat fee of $175 per current product used, and to include up to a 1-hour (maximum) financial consultation:

This service offers a complete review and fee analysis of the following financial products that you currently own.

- Life insurance review
- Mutual fund review
- Long Term Care insurance review
- Disability insurance review

The fee includes a hard copy report of the recommendations made.

Annuity Review Services: - This is a flat fee of $299, to include up to a 1.5-hour (maximum) consultation:

This service is for individuals who are in or near retirement and who seek a guaranteed income stream throughout retirement. We offer a complete review and comparative analysis of the different types of annuities and determine the most cost efficient way to ensure a steady income stream for life. The services offered are as follows:

- Annuity fee review and comparison
- Annuity risk review and comparison

The fee includes a hard copy report of the comparisons and recommendations made.

Investment Portfolio Review & Evaluation - $275 hourly fee.

This service is for the do-it-yourself investor who seeks professional assistance in managing his or investment portfolio, without having to give discretionary/trading authority to an Adviser, or be required to open an account through an adviser. An investment in the stock market involves substantial risk, even the loss of capital and interest. Therefore, invest only what you can afford to lose. Past performance is not an indication of future results.

Fee covers a hard copy report of analysis and recommendations made.

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IRA Rollover Strategies – $249 hourly fee.

- 401(k)
- Thrift Savings Plan
- 403(b) plans (Teachers, Professors, Hospital, Religious, Non-profit employees and staff members)

Fee includes a hard copy report of the recommendations made.

Comprehensive Financial Review – This is a flat fee of $899, to include up to 2.5 hours (maximum) consultation:

This service includes:

- Pathways to Financial Independence
- Asset Protection Review
- Annuity Review Services

Fee includes a hard copy report of the recommendations made

Payment Plans:

- Check, Cash or Money Order (No Credit Cards)
- Payment in full prior to commencement of work – All work completed within six months
- Prices are subject to change

Seminar/Workshop fees - Please call (240) 473.1314 for details