

**PLANNING AND MANAGEMENT FEES**  
**(\$2 million account)**

Charge for:	Connemara	Advisor A	Advisor B	Advisor C
On-boarding (establish account)	Included in plan fee	Included in AUM Fee	\$2,500	Included in AUM Fee
Asset management (AUM)	None (Client manages)	\$20,000/year (1%)	\$20,000/year (1%)	\$20,000/year (1%)
Prepare and present comprehensive financial plan (fixed fee basis)	\$5,995 - \$9,995	\$5,000	Only hourly	None
Prepare and present financial plan (hourly fee basis)	Only fixed fee basis	\$250/hour	\$425/hour	None
Periodic plan review (in person)	\$2,495 - \$3,995	\$250/hour	\$425/hour	\$5,000
<b>Fee total (over 10 years)</b>				
Lower fee fixed basis financial plan	\$11,326	\$154,920	\$161,159	\$160,262
Upper fee fixed basis financial plan	\$24,269	\$167,444	\$182,449	\$167,444

- Note:
- Fee total is sum of costs over ten years in *today's dollars*, assuming a 2.5% rate of inflation and a 3.5% investment return after inflation.
  - Excludes transaction fees and other broker, custodian, and mutual funds fees.
  - The fee totals assume 3-to-5 periodic reviews over the 10-year period.
  - All charges are based on actual advisors' official ADVs, as filed with the Financial Industry Regulatory Authority (FINRA).