



Scipio Financial

Integrity • Prudent • Reliable

Terry Scipio, CLU®

Terry@scipiofinancial.com

Office: 843-830-0019

Financial Planning Fees	
<i>Comprehensive Plan</i>	<i>Fee will be based on the complexity of the planning required a typical range would \$1,000 - \$2,500. (to be discussed and quoted prior to engagement)</i>
<i>General Questions</i>	<i>*Fee based on an hourly rate of \$250/hr. (hourly planning fee)</i>
<i>Custom Projects</i>	<i>\$250/hr, please send inquiry to determine total costs. (Ex : Insurance review, budget analysis, retirement projections etc.)</i>

Advisory Fee – Wealth Management Fees		
Assets Under Management		Fee
\$10,000	\$500,000	1.10 - 1.25%
\$500,001	\$1,000,000	1.00%
\$1,000,001	\$2,000,000	0.95 - 0.85%
\$2,000,001	\$3,000,000	Negotiable
\$3,000,001	\$5,000,000	Negotiable
\$5 Million +		Negotiable
<i>*Not Inclusive of Internal Expenses or Fund Strategist/Platform; Total Management Fee from 1.00% - 2.00%*</i>		

Financial Planning Services
Individualized Financial Plan & Recommendations
Client Review (<i>according to SLA</i>)
Access to eMoney software
Invitation to Client Educational Event(s)
Newsletter (Email)
Trust & Estate Planning
Education Planning

Risk Management	
Life Insurance	Group Benefits Insurance
Long-Term Disability Income Protection	Business Planning
Long-Term Care Insurance	Longevity Planning

* Fees are subject to change. Scipio Financial LLC ("Scipio Financial") is a Registered Investment Adviser.



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Comprehensive Financial Planning: \$1,000 (minimum)

Includes:

- Review of investment and retirement accounts
- Risk assessment
- Allocation analysis & recommendations
- Retirement projections
- Life insurance review
- Estate planning review
- Cashflow analysis

** All flat fee financial planning sessions include multiple face to face meetings (either in person or on Zoom), and a written plan document, with step-by-step guidance for implementation*

** Half of the initial fee is to be paid at the time of booking; remainder of fee to be paid following meetings, but prior to delivery of plan.*

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