

Find Your Freedom

Menu of Services				
	Platinum	Gold	Silver	NextGen
Asset Minimum (Managed by firm)	\$2,000,000	\$750,000	\$250,000	\$0
Annual Fee	Tiered AUM Fee	Flat AUM Fee	Flat AUM Fee	Flat Fee
	1.55%-\$2M-5M 1.0%-\$5M-25M 90%-\$25M-50M 80%-\$50M+	1.8%	1.8%	\$200/mo 1.8% AUM
Investment Management				
Diversified, Risk-Appropriate Investment Portfolio	•	•	•	•
Employer Plan Recommendations	•	•	•	•
Financial Planning				
Focused Financial Plan	•	•	•	•
Comprehensive Financial Plan	0.10% of total assets, \$3,500 minimum fee	\$3,500	\$3,500	\$3,500
Social Security Planning	•	•	\$250	
Education Funding	•	•	\$250	
Online Plan Access and Account Aggregation	•	•	•	•
Tax Planning				
Year-End Tax Planning	•	•		
Annual Income Tax Preparation and Filing	•	•	Additional Fee	Additional Fee
Roth Conversion Analysis	•	•		
Coordination with CPA	•	•		

	Platinum	Gold	Silver	NextGen
Estate Planning				
Beneficiary Review	•	•	•	•
Estate Plan Case Design	•	\$1,500	\$1,500	\$1,500
Family Meeting Facilitation	•			
Coordination with Estate Planning Attorney	•			
Charitable Giving Planning	•	\$250/Hour	\$250/Hour	\$250/Hour
Risk Management				
Life Insurance Needs Analysis/Review	•	•	•	•
LTC Needs Analysis/Review	•	•		
Disability Needs Analysis/Review	•	•		
Pension Maximization	•	•	•	
Communication & Education				
In-Person Review Meetings	2/year	1/year	1/year	
Phone Review Meetings	1/year	2/year	1/year	2/year
Virtual Financial Coaching Between Meetings	•	•	•	•
Weekly Education Newsletter	•	•	•	•
Trade Notifications	•	•	•	•
Online Education Center	•	•	•	•
Quarterly Wealth Management Educational Events	•	•	•	•

Carson Coaching
14600 Branch St
Omaha, Nebraska 68154

carsongroup.com
888.321.0808
info@carsongroup.com