Fee Schedule

To ensure that our interests remain aligned with our clients, our compensation is not based upon commissions or transactions. Our objective is to always make recommendations solely in the client's best interest. We are paid only by the client. We do not accept commissions, referral fees, or any other type of third-party compensation. Our engagement may be terminated at any time. We do not charge a termination fee.

For most clients, reasonable levels of retirement and estate planning advice as described in the appropriate sections of this website are included in our investment advisory fee described below. This includes a comprehensive retirement analysis and an assessment of current estate documents. Investment advisory fees begin upon signing the contract. Charges from third parties such as attorneys and accountants are not included in our fees. Our fee schedule is as follows:

Investment Planning & Portfolio Design, Portfolio Implementation, Monitoring & Reporting:
On amounts less than $1,000,000, 1% per annum, paid quarterly in advance from your account.
On amounts from $1,000,001 to $3,000,000, .75%
On amounts from $3,000,001 to $5,000,000, .50%
On amounts from $5,000,001 to $10,000,000, .40%
On amounts above $10,000,001, .35%

On accounts with a balance less than $500,000, a 0.25% surcharge is applied.
A one-time new account charge of $750 applies.

General Financial Advice (non-investment related):
For individual comprehensive financial planning which provides a detailed blueprint of your situation with recommendations, The Monitor Group charges a fee based on the level of effort and complexity of the situation. Typically, this plan costs between $5,000 and $10,000. After an initial meeting to discuss the scope of the engagement, a specific fee will be quoted.