ProActive Advisors LLC
"Who's Watching Your Money?"

FEE FOR SERVICES DESCRIPTION

Your choice of a Financial Advisor is likely the most important financial decision you will make. That's because your choice determines your investment costs, security selection, diversification, asset allocation, and tax efficiency. In short it determines your financial security. At ProActive Advisors we work under a Fiduciary standard of care. We work for your best interests.

WEALTH MANAGEMENT .50% - 1.25% Annually on a Declining Scale

A comprehensive, financial engagement that includes Financial Planning, Tax Planning, and Investment Management services on an on-going basis. This '*White Glove'* engagement contrasts with the services below that are one-time engagements and do not include comprehensive Financial Planning notably: Social Security Optimization, Tax Planning, Business consulting, and Estate Planning, nor proactive Risk Management of retirement & investment accounts.

While all financial engagements provided by ProActive Advisors are performed under a Fiduciary standard of care, our Wealth Management engagement provides anytime access without additional fees and includes implementation of financial advice for all your retirement and savings accounts.

Fees for Wealth Management are negotiable and priced on the complexity of your financial situation and on the assets under our management (AUM). Fees decline as your account value increases. For more details, access our Firm Brochure at the bottom of any page on this website.

FINANCIAL CHECK-UP AND SECOND OPINION $750

- ✓ Discovery Consultation
- ✓ Account(s) Review
- ✓ "GPS" Guidance
- ✓ Retirement Advice
Income Gap Analysis
- ✓ Risk Assessment
- ✓ Guidance on 401K,
403b, 457, TSP
- ✓ Annuity Evaluation
Partnership Evaluation
- ✓ Written Report
- ✓ 30 Day Support
after report delivery

- X Portfolio Monitoring
- X Portfolio Implementation
- X Financial Planning
- X Estate Planning

Popular with those seeking objective advice about their financial health, pre-planning retirement, how they are investing, or the appropriateness of financial product recommendations.

RETIREMENT PLAN MAINTENANCE ENGAGEMENT $2,000

- ✓ Discovery Consultation
- ✓ Account(s) Review
- ✓ Performance Evaluation
  - Cost Analysis
  - Security Selection
  - Diversification
  - Asset Allocation
  - Income Gap Analysis
  - Risk Assessment
- ✓ Guidance on 401K
403b, 457, TSP
- ✓ Roth Conversions
- ✓ Written Report
- ✓ One-time Implementation
- ✓ 30 Day Support
after report delivery

- X Portfolio Monitoring
- X On-going Implementation
- X Financial Planning
- X Estate Planning

Popular with those desiring a flat-fee-for-service arrangement and periodic financial guidance on their time schedule.

ON-TRACK FINANCIAL HEALTH ENGAGEMENT $3,000

RETIREMENT PLAN MAINTENANCE PLUS

- ✓ Financial Planning
- ✓ Roth Conversions
- ✓ Social Security Planning
- ✓ Medicare Plan Advice
- ✓ Income Distribution
- ✓ Insurance Review
- ✓ Legal Docs. Review
POAs, Wills, HCP, Living Tr.
- ✓ Tax Return Review
- ✓ One-time Implementation
- ✓ 30 Day Support
after report delivery

- X On-going Monitoring
- X Estate Planning

Popular with those Age 45+ who want to be attentive about their financial security for Retirement and overall financial well-being.

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