CFM is a Registered Investment Advisor with the SEC. We have a fiduciary duty to act in our clients' best interests at all times.
Please review the matrix below, and have a thorough discussion with a CFM advisor to select the plan that suits you the best.

Services	**One-Time Comprehensive Plan**	**Investment Management***	**Wealth Management****
Financial Goal Setting	**yes**	**yes**	**yes**
Investment Analysis and portfolio review	**yes**	**yes**	**yes**
Rebalancing Portfolio recommendations	**yes**	**yes**	**yes**
Ongoing Rebalancing of Portfolio	not included	**yes**	**yes**
Net Worth Review	**yes**	not included	**yes**
Cashflow Analysis	**yes**	not included	**yes**
Education Funding planning	**yes**	not included	**yes**
Corporate Stock Option Planning	**yes**	not included	**yes**
Retirement Life Planning	**yes**	not included	**yes**
Retirement budgeting planning	**yes**	not included	**yes**
Insurance Needs analysis	**yes**	not included	**yes**
Estate Planning	**yes**	not included	**yes**
Ongoing Income Tax Planning	not included	not included	**yes**
Income Tax Preparation	not included	not included	**if over $500,000 AUM**
Ongoing Planner available at your call	not included	**yes**	**yes**
Annual Plan Review Meeting	$2,000	not included	**yes**
Fee	Initial fee: $3,000	1% of account balance	1% of account balance 0.8% AUM over $1,000,000 0.5% AUM over $5,000,000

* Client must have assets monitored and managed by CFM. TD Ameritrade is the custodian for client investment accounts.
** Minimum annual fee is $2,000

Tax Preparation, Tax Planning, and CFM Roadmap can be provided on a pay-per-project basis. CFM will notify you in advance of the fee involved.