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 address any questions or concerns.

Wealth Management
Investment Management*
Financial Forecasting
Retirement Planning
Income Tax Preparation
Tax Planning
Life Financial Planning
Estate Planning
Cashflow Analysis
Education Funding Planning
Corporate Stock Option Planning
Insurance Needs analysis
Ongoing Review With a Wealth Manager
1% of assets under management 0.80% AUM $1,000,000 to $5,000,000 0.50% AUM over $5,000,000

* Client must have assets monitored and managed by CFM. TD Ameritrade is the custodian for client investment accounts.
In order to provide comprehensive financial planning, it is best that clients have all of their investment accounts managed by CFM.

(form updated 11/2021)