
Sutton Financial

Typical Flat-Fees for Comprehensive Goals-Based Financial Planning

Net Worth Under **\$1,000,000** - Flat-Fee Typically Between **\$500 - \$2,500**

Net Worth Between **\$1,000,000 - \$2,500,000** - Flat-Fee Typically Between **\$2,500 - \$5,000**

Net Worth Between **\$2,500,000 - \$5,000,000** - Flat-Fee Typically Between **\$5,000 - \$10,000**

Net Worth Between **\$5,000,000 - \$10,000,000** - Flat-Fee Typically Between **\$10,000 - \$15,000**

Net Worth Between **\$10,000,000 - \$30,000,000** - Flat-Fee Typically Between **\$15,000 - \$30,000**

ZERO Assets Under Management (AUM) Fees - Clients who subscribe to on-going financial planning services and desire to have Sutton Financial manage their investments, Sutton Financial will not charge a Financial Advisor Fee on Assets Under Management in any one of our various Advisory Accounts¹.

These fees indicate a typical fee Sutton Financial would charge and not your actual fee. Your actual flat fee is based on the complexity of your finances, depth of engagement and the number of financial planning services provided, not assets under management or net worth. Clients with a higher net worth and a larger amount of investable assets tend to have a more complex financial picture and need more services, which leads to more work on our behalf. This is why the typical flat fees shown above increase with an increase in a client's net worth. Your fee is mutually agreed upon after our initial consultation and prior to the beginning of our engagement.

Sutton Financial provides one-time or on-going financial planning services. Clients who subscribe to on-going financial planning services will have their fee set for a period of five years unless the parties mutually agree to amend the fee based on a change in the level of services. Unlike Financial Advisers/Financial Planners who charge Assets Under Management Fees, our fees do not increase simply because your investments and/or net worth continue to increase; especially if we do not perform more work on your behalf. We jointly establish your fee based on what is mutually fair and beneficial to both parties with our focus on providing you with the most comprehensive goals-based planning at the least possible cost.

[1] Note, additional fees for the Registered Investment Advisor, Eagle Strategies, LLC ("Eagle"), sub-manager (if applicable), Platform, administrative fees (including minimum fee), 12b-1, and Expense Ratio fees may apply. Any Eagle, administrative, sub-manager or Platform fee will be reflected in the Sponsor Fee on your Statement of Investment Selection and is fully described in Eagle's Form ADV Part 2A. The Sponsor Fee will vary depending on the selected program, manager, strategy, and the amount of assets invested through the platform.