ATTLEBORO
WEALTH MANAGEMENT
INDEPENDENT FINANCIAL ADVICE

Our Client Engagement Models

We offer several ways to work with clients, each designed to meet diverse needs:

1. Comprehensive Wealth Management: This is our most common engagement. Clients pay an annual fee based on the investment assets we are managing for a complete suite of services, including:

- Asset management
- Financial planning
- Custody services
- Full implementation of investment, tax, and plan strategies
- Ongoing monitoring and review of investment, tax, and plan strategies
- Assignment of a dedicated Financial Planner
- Annual financial planning process

Our fee schedule for this Comprehensive Service Agreement is attached.
Please note that tax preparation is offered separately through our affiliate, Attleboro Tax Services, as required by regulations.

2. Financial Planning Only: Occasionally, individuals who prefer not to have an ongoing comprehensive agreement engage us for a one-time financial plan. This involves our detailed 8-week planning process, resulting in a customized financial roadmap. However, the client is responsible for implementing and monitoring the recommended strategies. Our one-time financial planning fee typically ranges from $7,500.00 to $10,000.00.

3. Hybrid Approach: For clients who do not yet meet our $1,000,000.00 minimum for Assets Under Management (AUM), we offer a combination of services. This may include an Asset Under Management Agreement for accounts under our direct control or a Portfolio Monitoring Agreement for assets held elsewhere but still advised and monitored by us, alongside a Financial Planning Agreement.

4. Access to Specific Investments: A few times each year, individuals who manage their own financial plans and investments require our assistance in accessing specific investment products or platforms that are not readily available to them. In these situations, we can help facilitate access to the desired investment or solution without requiring a financial plan or other ongoing services.

1051 Lindenhurst Road | Yardley, PA 19067 | 215.310.9440
www.attleborowealth.com