

M. K. Schiller Consulting

Advice-only financial planning

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Dear Prospective Client :

Enclosed please find the information that you requested about my personal financial planning services. Two questions I thought you might like to have answered early on are: What kind of financial services do I provide, and what is required to prepare a financial plan? A description of my advice-only financial planning services, as well as a preliminary information package for you to complete, are attached.

The next step is for us to meet for a two hour session in person or by telephone at a flat fee of \$440.00 to outline your unique circumstances and needs. If we can also review the completed intake forms enclosed, I can give you an estimate of any additional hours needed if any (and thus the fee) to complete your financial plan.

A comprehensive plan may take between 20-50 hours total time, depending on individual circumstances. A partial plan, focusing on only a few goals, may require as little as 3-5 hours. (Additional work on other goals can be added to the plan later as needed.) I can be more specific about time required after I have spoken with you.

You will leave the initial meeting with a clear understanding of the nature and scope of the financial planning you desire, a better understanding of your financial goals and a solid basis for deciding if there is a good "fit" between your financial planning needs and the skills of M.K. Schiller Consulting.

Thank you in advance for your interest in M.K. Schiller Consulting financial planning services.

Sincerely,

Margery K. Schiller, CFP®
NAPFA Registered Financial Advisor