# Valued Retirements, Inc. Services & Pricing Packages

We help our clients make **Smart Decisions About Money** as we Engage, Enable and Empower.

| ENGAGE | ENABLE | EMPOWER |
|---|---|---|
| Connect with Individuals & Families | **Investment Management** from a team of **CFP® Professionals** | Pursuing Passions & Lifelong Learning |
| | **Retirement** Prep & Transition | |
| Discuss & Discover Client Desires | **Tax** Planning & Advice | Strategic Career Decisions |
| | **Estate** Planning & Advice | |
| Evaluate Reward & Risk Preferences | **Insurance** Assessments | Generosity & Donor-Advised Funds |
| | **Employer Benefits** Analysis | |
| **Financial Planning** & Roadmap for Living Life on Purpose | Expertise for **ExxonMobil**, **ConocoPhillips**, **Phillips66**, **Chevron** & **Shell** employees | Enhanced Travel & Experience |
| | Financial Service Referrals | |
| **Valuable education and opportunities for clients, their children, AND their grandchildren.** | | |

**Pricing Packages:**

No matter which package best fits you, one simple fee covers all the Engage, Enable, and Empower services you receive!

1. **Quarterly Assets-Under-Management (AUM) Fee**
   Tiered pricing based on balances of managed accounts at the end of each quarter (1% and below)
   Deducted directly from account(s) at TD Ameritrade
   Most appropriate for $1 million and above in AUM
   Generally appropriate for late-career professionals or current retirees

2. **Custom Retainer**
   Quarterly flat fee based on planning, advice, and investment management
   Deducted directly from account(s) at TD Ameritrade
   Generally appropriate for high earning, mid- or early-career professionals

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