



To Fee or Not to Fee

Seminars ♦ Workshops ♦ Training Material

Fee Model Solutions - Transition Workshop

Student support material and tools

Workshop binder (200 pages)

Latest Fee Advisor Survey Report (50 pages)

PowerPoint slides (over 200)

Transition plan template (.doc)

Letters of engagement (17)

Service agreement

Fee schedules (2)

Explaining your fees script

Fee-based investing client communication (3)

Client profitability and segmentation calculator (.xls)

Time cost calculator (.xls)

Tiered fee calculator (.xls)

Fee vs. commission revenue calculator (.xls)

Revenue trend chart (.xls)

Transition tracking (.xls)

Comprehensive plan time/cost estimator and quotation (.xls)

Investor segmentation reports (3)