



*Your Values + Your Goals
Inspire Your Success*

Jamison & Associates Compensation

- 1) **Initial Financial Planning Fee** – After the completion of your Financial Roadmap and when you want us to move forward with the preparation of your personalized and comprehensive financial plan, an amount will be determined based upon the complexity and scope of the work. Your planning fee will be a fixed amount and is paid in advance.
- 2) **Consulting Fees** – After the initial financial plan is completed, any new financial development that requires additional research to determine what effect it will have on the existing plan, or a new additional product that needs to be recommended, a fixed fee will be quoted and agreed upon at the time and the fee will be paid in advanced.
- 3) **Asset Management Fees** – Any account that is managed by an asset manager will be assessed a percentage of assets under management fee. This management fee will vary depending on which program and manager is chosen. The fee will be quoted and agreed upon before opening the account.
- 4) **Commissions** – Some of our compensation comes from products (mostly insurance products) that pay a commission directly to us from the product company. You will be informed of any situations that are applicable to your plan, on a case by case basis.
- 5) **Annual Service Agreements** – This type of agreement is available for situations where there is an on going amount of service needed on a various time frame basis such as monthly, quarterly, and semi-annual or annual basis. You will be quoted in advance of services, agreed upon and paid in advance before the work is completed.