



Pricing & Process

Financial Planning Made Simple

We believe in a straightforward, transparent approach to financial advice. No hidden fees, no surprise charges. Our goal is to align our success with yours.

Our 5-Step Planning Process

The Introduction

Complimentary Portfolio Review

We start by getting to know you—because money is just a tool, and life, love, and family truly matter.

Discovery

Gather Your Account Details

We'll gather your details and use our Retirement Roadmap to assess your goals.

Analysis

Review your finances from A to Z

Once we understand your full financial landscape, we present a clear, personalized assessment.

Planning & Implementation

Develop & Implement Your Plan

Create and implement a customized, tailored plan with goal-focused investments.

Monitor, Review, Adjust

Ongoing Oversight

Life changes—so should your plan. We meet regularly to keep your goals and portfolio aligned.

Our Pricing Philosophy

We use an Assets Under Management (AUM) model. This means one all-inclusive annual fee that covers:

- Investment management
- Comprehensive financial planning
- On-going financial consultations as needed

No extra planning fees. No layered charges.

We calculate your fee based on your total household assets under management.

Ken Beber, AIF®, CFS®
Financial Advisor

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**PURPOSE
WEALTH**
P A R T N E R S

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Annual Rate Schedule

Assets Managed	Annual Rate*
\$0 - \$250,000	1.25%
\$250,000 - \$500,000	1.10%
\$500,000 - \$1,000,000	1.00%
\$1,000,000 - \$3,000,000	0.80%
\$3,000,000 - \$5,000,000	0.65%
Over \$5,000,000	0.50%

*Rates may vary based on account type. Annual rate reflects advisory fees paid to Purpose Wealth Partners.

Your financial journey is unique, and your plan should be too.

We're here to ensure it grows with you, adapting to life's changes while keeping your goals on track.

At Purpose Wealth Partners, we help clients achieve their financial goals by staying true to traditional values, common sense, and principled stewardship. With over 40 years in the financial industry, we've walked alongside families through every phase of life. Many of our client relationships span generations—and we're here for the long term, because your future is worth it.

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