

# Iacangelo Financial Group, LLC

170 Commerce Way, Suite 200

Portsmouth NH, 03801

## ***FINANCIAL PLANNING AGREEMENT***

<b>Client Name:</b>	
<b>Client Address:</b>	
<b>Client Phone:</b>	

Client engages with Iacangelo Financial Group, LLC (“IFG”) for financial planning and consulting services. Firm hereby accepts appointment and fiduciary duty of utmost good faith to act solely in the best interests of each client pursuant to the terms and conditions set forth in this Agreement and to comply with impartial conduct standards of:

- Charging no more than reasonable compensation for services provided; and
- Making no misleading statements regarding investments, compensation and conflicts of interest.

Financial plans will be performed for the following modules:

<input type="checkbox"/> Independent Objective Portfolio Analysis	<input type="checkbox"/> Estate Enhancement and Preservation Analysis
<input type="checkbox"/> Tax Allocation Analysis	<input type="checkbox"/> In-Force Life Insurance Audit
<input type="checkbox"/> Social Security Strategy Planning	<input type="checkbox"/> Advanced Retirement Income System Analysis
<input type="checkbox"/> College Planning	

Financial planning services are offered based on a fixed fee based on net worth as follows:

Net Worth	Total Fee
Under \$1,000,000	\$1,500
\$1,000,000 to \$2,000,000	\$2,400
Over \$2,000,000	\$3,300

  

College Planning	\$3,500
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The payments for financial planning are payable in two installments: one-half at the commencement of the planning process with the balance of the final payment due upon delivery of the completed plan.

College Planning fees are billed:

- Upon commencement of the Advisory Agreement
- 50% upon commencement of the Advisory Agreement, with the balance due upon plan delivery of the completed plan
- Upon delivery of the completed plan

Client may terminate the Agreement for a full refund at any time up to ninety (90) days from engagement. Financial plans will be completed and delivered within fourteen (14) days.

- **FIXED FEES**

The fixed fee for preparing the financial plan is \$\_\_\_\_\_

\_\_\_\_\_  
Client Initials

\_\_\_\_\_  
Client Initials

January 29, 2024

No assignment of this agreement by IFG shall be effective without the prior written consent of Client.

Client acknowledges receipt of Privacy Policy, Investor Protection Information Form and Form ADV 2 of IFG. For the purposes of this provision, a contract is considered entered into when all parties to the contract have signed the contract or otherwise signified their acceptance, any other provisions of this contract notwithstanding. Under financial planning services, the client will receive a one-time written financial plan addressing the specific agreed upon objectives laid out in the client agreement. Engagement in future planning services is at the discretion of the client and a new agreement will be executed based on the new objectives, given the revised scope of those objectives.

Client acknowledges that representatives of IFG may provide client with various insurance products upon which a commission may be paid to IFG's representatives, and such commissions are separate and apart from the fees charged under this Agreement. A conflict exists because of the relationship. This conflict is mitigated by disclosures, procedures, and the firm's Fiduciary obligation. The client is under no obligation to act upon the investment advisor's recommendations. If the client elects to act on any of the recommendations, the client is under no obligation to effect the transaction through IFG's representatives.

**Iacangelo Financial Group, LLC**

By: \_\_\_\_\_ Date: \_\_\_\_\_

**CLIENT DATA**

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_