Helping you align your investments with your values™

Need a Guide?

You need your investments to reflect your personal values, your comfort with risk, and your financial needs. You have reached a point in your life where your level of financial complexity means you need a financial advisor. You are ready to work with a partner who can answer questions specific to you, so you don't spend hours reading a dozen financial blogs and still not have an answer.

SERVICES:

- Responsible investment management that aligns with your personal values.
- A relationship with a financial advisor, who meets with you annually.
- Because life happens, you can reach out when you have a question about your investments and whenever you have life changes.
- Your advisor can communicate with your CPA or attorney at your request.
- We conduct investment research on your behalf, so that your own time is freed up from selecting investments.

Minimum investable assets: $250,000
Base pricing schedule

Add Planning

You are ready to map out different life stages and be proactive about major life transitions. You want an advisor who shares your values, listens to your vision, holds you accountable, and helps you maintain focus on specific goals, like when you want to retire.

ADDITIONAL SERVICES:

- You will meet with a financial planner 3-4 times in the first year to create your initial plan.
- Your planner will update the plan annually and join your reviews.
- If questions come up between meetings, your financial advisor and financial planner will work together to address your questions.

Additional costs apply; see pricing on back.

Need a Team?

You need a partner to simplify the financial complexity in your life. In addition to investment strategy and a financial plan, you are looking for high-level, generational, holistic financial services. You want a financial advisor to coordinate advice from other professionals, whether it regards setting up a trust, philanthropy, business succession plans, or reviewing your insurance policies.

ADDITIONAL SERVICES:

- Your advisory team includes your financial advisor, financial planner, and the Director of Investments.
- You may invite your other professionals (accountants, attorneys, insurance agents, etc.) and family members to meetings with your advisory team.
- Your advisor conducts reviews biannually.
- Our Director of Investments and your advisor will build a customized portfolio to meet any unique needs you may have if it is appropriate.
- Your advisor will help you develop charitable gifting strategies to leave behind a legacy of impact.
- Because wealth management encompasses multiple generations, we are also available to meet with your children and grandchildren to go over investment basics, budgeting, and basic financial planning.

Minimum investable assets: $1,500,000
Base pricing schedule, planning included

Base Pricing Schedule

ACCOUNT VALUE	EARTH EQUITY ADVISORS	E*TRADE	TOTAL
$0–$250,000	1.25%	0.25%	1.50%
$250,000–$500,000	1.10%	0.15%	1.25%
$500,000–$1 million	0.92%	0.08%	1.00%
$1 million–$5 million	0.79%	0.01%	0.80%
$5 million +	0.39%	0.01%	0.40%

+ Planning:

You have the option to develop a financial plan for an added cost. The creation of your initial financial plan is a one-time fee that covers a customized review of your financial situation, goals, and needs, and provides specific recommendations. Fees range from $2,400–$4,800 depending on situation and complexity. Annual planner engagements provide ongoing review, advice and management of financial strategies. Minimum annual fees: $600. Investments are billed at the rates listed in the above table.

As a client at Earth Equity Advisors...

- All of your investments are stringently screened to ensure that they are fossil fuel free and socially responsible.
- You have a dedicated financial advisor who knows your personal goals and financial life.
- We can securely store copies of your will, trust documents, insurance policies, and additional important information.
- Our client service team is here to help you with moving money, updating beneficiaries, consolidating accounts, and accessing information online. They can be reached at: clientservice@earthequityadvisors.com.