Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A ("Brochure"), as these sections of the Brochure contain important details about Lavish Financial Planning advisory services and fees. Fees may be negotiable. The fees below will only apply to you when you request the services listed.

Fees Charged by Lavish Financial Planning	Fee Amount	Frequency Fee is Charged	Services
A percentage of assets under your management	Asset Management $0 - $500,000 at a rate of 1.00% $500,001 - $1,000,000 at a rate of 0.75% $1,000,001 and Above at a rate of 0.60%	Quarterly in arrears	Portfolio management for individuals and/or small businesses; Financial planning services
	Employee Benefits plan Services 0 - $3,000,000 at a rate of 0.40% $3,000,001 - $5,000,000 at a rate of 0.35% $5,000,001- $10,000,000 at a rate of 0.30% $10,000,001 and Above at a rate of 0.25%	Quarterly in arrears	Portfolio management for individuals and/or small businesses
Hourly Fee	$350	Arrears	Financial planning services
Subscription fees (for a newsletter or periodical)	$0	$0	$0
Fixed fees (other than subscription fees)	Lavish Pro Package $2,790 upfront followed by $335 per month for individuals	Advance and monthly in arrears	Portfolio management for individuals and/or small businesses; Financial Planning Services
	Lavish Pro Package $3,300 upfront followed by $450 per month for Couples	Advance and monthly in arrears	Portfolio management for individuals and/or small businesses; Financial Planning Services
	Lavish Concierge Package $12,000 annual fee	monthly in arrears	Portfolio management for individuals and/or small businesses; Financial Planning Services
Commissions	N/A	N/A	N/A
Performance-based fees	N/A	N/A	N/A

Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager	$0 - $500,000 at a rate of 1.00% $500,001 - $1,000,000 at a rate of 0.75% $1,000,001 and Above at a rate of 0.60%	Quarterly in arrears	Portfolio management for individuals and/or small businesses; Financial planning services
Robo-Adviser Fee	N/A	N/A	N/A
Talk with your Adviser about fees and costs applicable to you			

Additional fees and costs to discuss with your Adviser

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	SEI, Charles, Schwab, AssetMark, and Betterment Institutional
Commissions	Yes	SEI, Charles, Schwab, AssetMark, and Betterment Institutional
Custodian Fees	Yes	SEI, Charles, Schwab, AssetMark, and Betterment Institutional
Mark-ups	Yes	Charles Schwab & Co., Inc.
Mutual Fund/ETF Fees and Expenses	Yes	Each exchange-traded fund (ETF) and mutual fund manager has their own underlying investment fee and expense which is charged directly to the net asset value of the security. More information regarding such fees is available in the security prospectus.

Effective: June 1, 2026