

THE COST OF **ADVICE**

A BREAKDOWN OF THE COSTS ASSOCIATED WITH FINANCIAL ADVICE



ADVICE

- Discovery And Goal Setting
- Analysis And Planning
- Recommendations
- Implementation
- Ongoing Monitoring
- Professional Development And Designations

OFFICE EXPENSES

- Office Space
- Staffing
- Information Systems
- Business Insurance

REGULATORY FEES

- E&O Insurance
- Securities Registration
- Compliance And Oversight
- Accounting, Audit And Legal

DEALER SERVICES

- Account Administration
- Record Keeping
- Trade Execution
- Statements And Reporting
- Technology

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