



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 Demers Financial Planning advisory services and fees. Fees are generally not negotiable. The fees below will only apply to you when you request the services listed. Different fees may represent alternative payment options for similar services or combinations of services. Talk with Demers Financial Planning about what services are appropriate for you and the fees that will apply.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services		
Assets Under Management Fee	0.6%	Quarterly	Wealth Management		
Hourly Fee	\$0	N/A	N/A		
Subscription Fee	\$0	N/A	N/A		
Fixed Fees	\$2,500 base fee plus % of assets under advisement: 0-\$2million - .6% \$2million - \$ 5million .4% Over \$5million .3%	Quarterly	Comprehensive Financial Planning Services		
	\$3,000			Per project	Retirement Review
	\$3,000			Per project	Financial Review
Commissions to the Adviser	\$0	N/A	N/A		
Performance-based Fee	\$0	N/A	N/A		
Other - Tax prep	\$500 - \$1000	Per return	Tax prep		
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services		
Turnkey Asset Management Program (TAMP) optional	.275% Assets under management	Quarterly	Portfolio management and back office services		
Robo-Adviser Fee	\$0	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	Broker Dealer
Commissions	Yes	Broker Dealer
Custodian Fees	Yes	Custodian
Mark-ups	No	N/A
Mutual Fund/ETF Fees and Expenses	Yes	Fund Manager(s)