



Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”) for more details of Demers Financial Planning advisory services and fees, respectively. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees generally are not negotiable but may be discounted at the advisor’s discretion.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management	Less than \$1 million – \$10,000* \$1-3 million - 0.6% Over \$3 million - 0.3% *\$10,000 minimum fee	Quarterly	Wealth Management
Hourly Fee	\$0	n/a	n/a
Subscription Fee	\$0	n/a	n/a
Fixed Fees	\$3,000-\$8,000 Financial Review	Per project	Financial Review
Commissions to the Adviser	\$0	n/a	n/a
Performance-based Fee	\$0	n/a	n/a
Other	\$0	n/a	n/a
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third-party Asset Manager	.275 - .50%/year	Quarterly	Investment management
Robo-Adviser Fee	n/a		
Fee Total	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	No	
Commissions	No	
Custodian Fees	Yes	Custodian
Mark-ups	No	
Mutual Fund/ETF Fees and Expenses	Yes	Mutual Fund/ETF Company

Effective 08/29/2022