



***Lilith and Co. Incorporated***

Doing Business As: ***Lilith Capital Advisors and Lilith Capital***

Address: ***75 State Street Boston, MA 02109***

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Website: ***lilith.capital***

## A. Fee Schedule

Financial & Investment Planning	\$250 per hour or fixed fee per plan (i.e., \$2,000 - \$5,000)
Trust Creation and Consulting	Fixed fee per trust \$5,000
Retirement Planning	\$200 per hour or fixed fee per plan (i.e., \$1,500 - \$4,000)
Portfolio Diversification Consulting	\$200 per hour or fixed fee based on portfolio size
Family Financial Planning	\$350 per hour or fixed fee per plan (i.e., \$2,000 - \$5,000)
Marriage Financial Planning	\$350 per hour or fixed fee per plan (i.e., \$2,000 - \$5,000)
Collectible Assets, Art & Antiques Investment Consulting (e.g., Wine, Cars)	\$2,000 per hour or fixed fee per plan
Education Funding Planning	Fixed fee per plan (i.e., \$1,000 - \$2,000)
Startup Advisory	\$250 per hour or fixed fee per plan
Insurance Needs Assessment	\$200 per hour or fixed fee based on complexity

Comprehensive Personal Financial Review	Fixed fee per review (i.e., \$2,500 - \$5,000)
Personalized Investment Strategy Design	Fixed fee per strategy (i.e., \$3,000 - \$7,000)
Estate Planning	\$2,000 per hour or fixed fee per plan
Multigenerational Wealth Transfer Planning	\$300 per hour or fixed fee per plan (i.e., \$3,000 - \$6,000)
Philanthropy/Charitable Giving Consulting	\$1,500 per hour

**B.** We bill our clients by sending a retainer fee after an agreement to provide services and then we send a final bill. Clients who do not pay the second bill for services provided will be charged interest.

**C.** Lilith and Co Incorporated dba Lilith Capital Advisors does not have custody of client funds.

**D.** A client can only get a refund of the retainer if the service is not provided.

**E.** We are strictly an investment advisor and do not sell any securities.