

# The Family Pricing Program

Your entire family can enjoy lower average advisor fees with our Family Pricing Program value-added service, available only to our best clients.

It's simple, our fully transparent advisor fees are reduced<sup>(1)</sup> on average as your portfolio grows. When a family member (brother, sister, children, grandchildren, grandparents) joins the West End Wealth Planning family<sup>(2)</sup> their portfolios are added to The Family Pricing Program for fee purposes resulting in lower average advisors' fees for the entire family.

The more family members who join, the greater the fee reductions for all and your entire family will still enjoy personal wealth planning service<sup>(3)</sup>.

## The Process



Provide us contact information for those who would like an introduction to us and our service.



We will contact those interested by phone and arrange to send them our introduction kit and set up a follow phone call.



The follow up call will determine if there may be a good fit to meet.



During the meeting we review what is important to them and introduce our practice and services.



We will then both determine if there is a fit for us to work together.

<sup>(1)</sup> Based on West End Wealth Planning's standard tiered pricing (subject to change)  
<sup>(2)</sup> Each family members entire portfolio must be handled by West End Wealth Planning to be eligible  
<sup>(3)</sup> Full service as defined by West End Wealth Planning service & communication matrix