



WOLFPACK WEALTH MANAGEMENT

Pricing for Services Summary

Simple, Transparent Pricing

Wolfpack Wealth Management is a fee-only financial advisory firm. We believe understanding how your advisor is compensated should be simple. The summary below provides an overview of our services and pricing. Fees vary based on the services selected and the scope and complexity of your financial needs. Your specific fee will be agreed upon before services begin. Please refer to Items 4 and 5 of our Form ADV Part 2A for complete information regarding our services, fees, and important disclosures.

Wealth Management & Financial Planning Services

Service	Pricing	Frequency	What's Included
Wealth Management Services ¹	\$4,800 to \$42,000	Annual flat fee; billed monthly or quarterly in arrears	Our most comprehensive ongoing relationship. Combines ongoing financial planning and professional investment management under one flat annual fee. We continuously monitor and update your financial plan as your life evolves.
Wealth Management Eligibility Wealth Management is generally designed for clients with \$500,000 or more in investable assets for Wolfpack to manage. This is a general guideline, not an absolute account minimum.			
Complete Financial Plan Creation ²	\$3,600 to \$30,000	One-Time Engagement; Flexible Payments Available	Comprehensive financial planning. Brings the different areas of your financial life together into one coordinated plan, with personalized strategies and actionable next steps.
Partial Financial Plan Creation ²	\$900 to \$3,600	One-Time Engagement; Flexible Payments Available	Focused financial planning. Built around 3–4 areas that matter most to you, with personalized strategies and actionable next steps.
Hourly Financial Planning	\$400 hourly rate	Hourly	As-needed financial planning. Personalized advice for specific questions or individual planning needs, billed by the hour.

Standalone Investment Management & Business Retirement Plans

Service	Assets (K = Thousand) (M= Million)	Annual Fee	Frequency	Description
Standalone Direct Investment Management Services ³	\$0 – \$2.5M	0.85%	Quarterly in arrears; daily average	Professional investment management for clients who do not engage Wolfpack for Financial Planning. Includes customized portfolio construction and ongoing discretionary portfolio management. Fees follow a tiered asset-based schedule.
	\$2.5M – \$5M	0.65%		
	\$5M – \$10M	0.55%		
	\$10M – \$25M	0.50%		
	\$25M – \$50M	0.45%		
	\$50M – \$100M	0.40%		
	\$100M+	0.35%		
Business Retirement Plan Consulting Services ⁴	\$0 – \$500K	\$3,000/year	Quarterly in arrears	Investment advisory consulting for employer-sponsored retirement plans in a 3(21) co-fiduciary capacity. Fees follow a tiered asset-based schedule.
	\$500K – \$1M	0.60%		
	\$1M – \$5M	0.50%		
	\$5M+	0.40%		

Additional Charges and Fees

Type	Description
Commissions to Advisor	None
Performance-Based Fees	None

Notes:

- Wealth Management Services**
Wealth Management Services combine professional investment management and ongoing financial planning under a flat annual advisory fee. Wealth Management fees are not calculated as a percentage of assets under management. Fees are based on factors including financial complexity, anticipated scope of services, estimated time commitment, research, and resources required.
Important Disclosure: Because Wealth Management uses a flat annual fee, clients with lower managed asset balances may pay an effective advisory rate exceeding 2% of assets under management.
- Financial Planning Fees**
Complete and Partial Financial Planning fees are based on the scope and complexity of the engagement, estimated time commitment, research, and resources required. Payment arrangements are agreed upon before services begin. Payment plans may be available.
- Standalone Direct Investment Management**
Standalone Direct Investment Management is separate from Wealth Management Services and does not include Financial Planning. Fees are calculated using the applicable tiered asset-based schedule and billed quarterly in arrears based on the daily average account value.
- Business Retirement Plan Consulting**
Business Retirement Plan Consulting fees are based on plan assets according to the schedule above. For start-up plans with less than \$500,000 in assets, Wolfpack charges a minimum flat fee of \$750 per quarter (\$3,000 annually) until plan assets reach \$500,000.
- Estate Planning & Affiliated Tax Services**
Financial Planning may include estate planning coordination. Wolfpack does not provide legal advice or draft legal documents. Where applicable, legal documents are prepared by licensed attorneys through a third-party estate planning provider. Certain eligible Wealth Management clients may also receive tax preparation and accounting services through Wolfpack Tax & Accounting LLC, an affiliated entity. Clients are under no obligation to use affiliated tax services and may work with a tax professional of their choosing. Specialized tax matters may be referred to an external tax professional.
- Additional Costs**
Advisory fees do not include certain custodial, transaction, investment product, legal, tax, or other third-party expenses that may apply. Please review our Form ADV Part 2A for complete information regarding fees, expenses, conflicts of interest, and other important disclosures.

Effective Date: September 23, 2026