



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 Sycamore Financial Planning advisory services and fees. Fees may be negotiable. The fees below will only apply to you when you request the services listed.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	\$0	N/A	N/A
Hourly Fee	\$320 / hour (Josh & Ethan) \$380 / hour (Chuck)	In 6-minute increments	Financial Planning Services, Educational Seminars/Workshops, Selection of Other Advisors
Subscription Fee	\$0	N/A	N/A
Fixed Fee	Fees are calculated on a client-by-client basis according to complexity of client needs (for current clients under contract, the range is from \$1,400-\$38,000).	Quarterly in arrears	Portfolio Management for Individuals and/or Small Businesses
Commissions to the Advisor	\$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 Money Manager	\$0	N/A	N/A
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	Brokerage
Commissions	No	N/A
Custodian Fees	Yes	Custodian
Mark-ups	No	N/A
Mutual Fund/ETF Fees and Expenses	Yes	Custodian

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