

PACESETTER PLANNING

Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”) for more details of Pacesetter Planning LLC’s advisory services and fees, respectively. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees are negotiable in certain circumstances.

Fees Charged by Investment Adviser	Fee Amount		Frequency Fee is Charged	Services
Assets Under Management Fee	\$0 - \$1 million \$1 million - \$3 million Over \$3 million	1.00% 0.75% 0.50%	Quarterly in arrears	Financial planning services; Portfolio management for individuals
Hourly Fee	\$250/hour		Monthly in arrears or per project	Financial planning services; Portfolio management for individuals
Subscription Fee	\$333.33 - \$833.33, based on complexity		Monthly in advance	Financial planning services; Portfolio management for Individuals; Other
Fixed Fee	\$2,997 - \$5,997, based on scope and complexity		Per Project	Financial planning services; Other
Commissions to the Adviser	N/A			
Performance-based Fee	N/A			
Fixed Fee	\$47 - \$997		Per Course	Online Courses
Fees Charged by Third Parties	Fee Amount		Frequency Fee is Charged	Services
Third Party Money Manager	N/A			
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	Yes	Brokerage or Custodial Firm
Commissions	Yes	Brokerage or Custodial Firm
Custodian Fees	Yes	Brokerage or Custodial Firm
Mark-ups	No	Brokerage or Custodial Firm
Mutual Fund/ETF Fees and Expenses	Yes	Mutual Fund/ETF Manager

Effective: March 7, 2024