



Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”) for more details of Access Financial Planning, LLC’s advisory services and fees, respectively, as these sections of the Brochure contain important details about Access Financial Planning, LLC’s 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	First \$500,000 – 1.0% Next \$500,000 – 0.9% Next \$1,000,000 – 0.8% Over \$2,000,000 – 0.7%	Quarterly in arrears	Investment management services
Assets Under Advisement Fee	First \$500,000 – 0.5% Next \$500,000 – 0.4% Next \$1,000,000 – 0.3% Over \$2,000,000 – 0.2%	Quarterly in arrears	Investment advisory services
Hourly Fee	\$0	n/a	n/a
Subscription Fee	\$0	n/a	n/a
Fixed Fee	\$6,000 - \$10,000	Quarterly in advance	Comprehensive financial planning
Commissions to the Adviser	\$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	0.35%	Quarterly in arrears	Portfolio Management
Fees may not apply to all clients; 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	TD Ameritrade, Inc.
Commissions	No	n/a
Custodian Fees	Yes	TD Ameritrade, Inc.
Mark-ups	No	n/a
Mutual Fund/ETF Fees and Expenses	Yes	Each exchange-traded fund (ETF) and mutual fund manager has their own underlying investment fee and expense which is charged directly to the net asset value of the security. More information regarding such fees is available in the security prospectus.

Effective 7/5/2021