



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	0.75%	Quarterly in advance	Wealth management services
Assets Under Advisement Fee	0%	n/a	n/a
Hourly Fee	\$0	n/a	n/a
Subscription Fee	\$0	n/a	n/a
Fixed Fee (per quarter)	\$1,500 – 2,500	Quarterly in advance	Financial planning only
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	n/a	n/a

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 if applicable	Yes	Charles Schwab & Co.
Commissions	No	n/a
Custodian Fees if applicable	Yes	Charles Schwab & Co.
Mark-ups	No	n/a
Mutual Fund/ETF Fees and Expenses if applicable	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 12/10/2024