



Stagecoach Investment Consulting, LLC
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 Stagecoach Investment Consulting’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	\$250,000 - \$1,000,000	1.00%	Quarterly in arrears based on the average of the month end market values within each calendar quarter	Portfolio management services for individuals and/or small businesses
	\$1,000,001 - \$3,000,000	0.85%		
	\$3,000,001 - \$5,000,000	0.75%		
	\$5,000,001 - \$10,000,000	0.65%		
	Over \$10,000,000	0.50%		
Hourly Fee	Negotiated		Negotiated	Financial planning services (amendments to existing plans)
Subscription Fee	\$0		N/A	N/A
Fixed Fee	\$2500 per financial plan		50% due up front, remaining 50% due at completion	Financial planning services
Other (Pre-retirement planning fee)	\$1000 per pre-retirement plan			Pre-retirement planning services
Commissions to the Adviser	\$0		N/A	N/A
Performance-based Fee	\$0		N/A	N/A
Other (Consulting Fee)	Negotiated; not to exceed 1.00% of plan assets		Negotiated	Pension Consulting Services; Qualified Plan Consulting
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	Charles Schwab
Commissions	Yes	Charles Schwab
Custodian Fees	Yes	Charles Schwab
Mark-ups	No	
Mutual Fund/ETF Fees and Expenses	Yes	Mutual Fund and ETF Companies

Effective August 29, 2022