Our asset-based fee for financial planning, asset allocation, investment management, and performance monitoring follow a blended fee schedule:

Wealthcare Mid-Atlantic Fee Schedule

1.00% on the first $500,000
0.85% on the next $500,000
0.70% on the next $2,000,000
0.60% over $3,000,000

This fee is collected on a quarterly basis and calculated as a percentage of the value of the cash and investments in your account[s] that we manage.

In addition to our advisory fee, you will also be responsible for third party manager fees, expenses related to mutual funds and exchange-traded funds and applicable securities transaction fees. If you are in our wrap fee program, applicable securities transaction fees will be included in our advisory fees.

The minimum account size is $100,000. Accounts below this threshold are subject to a 1.75% flat fee.