

FEES & ENGAGEMENT

Transparent. Aligned. Designed to Deliver
Clarity and Confidence.



Why Flat Fees Matter

At LeClair, we don't charge based on how much money you have, but on the value we provide. Successful families and business owners deserve advice that's independent, objective, and free of hidden incentives. That's why our compensation is clear, consistent, and not tied to portfolio performance or product use.

We are fiduciaries and we've structured our fee model to reflect it.

What You Can Expect

Our flat annual fee covers everything you need to align your wealth with your vision

- ✓ A comprehensive, values-driven wealth strategy
- ✓ Tax mitigation and estate planning coordination
- ✓ Access to exclusive private investment opportunities
- ✓ Integration with your legal, tax, and business advisors
- ✓ Ongoing adjustments as your life and business evolve

No product sales. No hidden percentages. Just objective advice and complete alignment.

How our Engagement Works

1. Discovery Meeting

We get to know who you are, how you built your success, and what you want your wealth to do for your family, your business, and your future.

2. Initial Wealth Plan

We deliver a strategic plan that reflects your values, priorities, and risks. It's a chance for you to see how we think, before you commit to working together.

3. Commitment & Advisory Relationship

If there's mutual fit, we enter into a flat-fee relationship. From there, we deliver the full Advanced Planning Roadmap, built across four areas:

- Wealth Enhancement
- Wealth Transfer
- Wealth Protection
- Charitable Giving & Tax Mitigation

Fee Structure

We charge an annual flat fee, billed quarterly, based on the complexity of your planning needs, not your asset level.

Client Type	Typical Range*
High-Net-Worth Families	\$25,000-\$50,000/year
Business Owners / Entrepreneurs	\$35,000-\$75,000/year
Family Offices & Complex Planning	Custom engagement

*Final fee is determined after your Initial Wealth Plan and is always agreed upon in writing, before any work begins.

How We’re Different from Traditional Advisors

	LeClair Wealth Partners	Traditional Advisors
Compensation Model	Flat Annual Fee	% of Assets (AUM-based)
Fiduciary Standard	Yes, Always	Not always
Investment Products	No commissions or conflicts	May receive revenue-sharing
Tax & Estate Planning	Fully integrated	Referred out or fragmented
Private Investments	Direct access (for qualified clients)	Limited or unavailable

Ready for a better wealth experience?

Let’s talk about what matters most to you and how we can help you align your wealth with your values, family, and legacy.

→ SCHEDULE A CALL



Disclosures & Disclaimer

LeClair Wealth Partners is a Registered Investment Advisor. This checklist is informational only and does not constitute legal, tax, or investment advice. Always consult qualified professionals before implementing any strategy.