

BeingFit Financial, LLC Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A ("Brochure") for more details of BeingFit Financial advisory services and fees, respectively. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees may be negotiable. *Dated: March 2023*

Fees Charged by Investment Adviser	Fee Amount		Frequency Fee is Charged	Services
Assets Under Management Fee	First \$1,000,000 -- 0.75% annually		Quarterly in arrears	Portfolio management for individuals and/or small biz
Assets Under Management Fee (w/use of Sub-Advisor)	\$1,000,001 - \$2,500,000 -- 0.50% annually \$2,500,001 - \$5,000,000 -- 0.25% annually \$5,000,001 and up – negotiable		Quarterly in advance	
Hourly Fee	\$250 - \$400 \$250 - \$750		Negotiable	Tax Preparation Services Financial Planning Services
Fixed Fee (Ongoing Financial Planning Upfront) Basic (Core) Comprehensive (Total)	\$500 - \$1500 \$1000 - \$3,000		Upon engagement	Financial Planning Services
Fixed Fee (Ongoing Financial Planning) Basic (Core) Comprehensive (Total)	\$1200 - \$3000 annually \$4000 - \$24,000 annually		Monthly or Qtly, in arrears	Financial Planning Services
Fixed Fee (Project Based Financial Planning)	\$1500 - \$15,000		Half upon engagement; Half upon completion	Financial Planning Services
Fixed Fee (Tax Preparation Services)	Base price: \$400 (individual); \$600 (Sch. C or E) \$1000 (business); organization, complexity add		Upon engagement	Tax Preparation Services
Fixed Fee (Ongoing Tax Advisory Upfront Fee)	\$250 - \$1000		Upon engagement	Tax Preparation and Advisory Services
Fixed Fee (Ongoing Tax Advisory and Preparation))	\$1000 - \$4000 annually		Monthly or Qtly, in arrears	Tax Preparation and Advisory Services
Fixed Fee (Educational Seminars/Workshops/Events to the Public)	\$0 - \$500 per participant		Upon registration	Educational Seminars/Workshops
Fixed Fee (Educational Seminars/Workshops/Events to Organizations)	\$0 - \$500 per attendee		Negotiable	Educational Seminars/Workshops
Fixed Fee (Speaking Engagements)	\$0 - \$15,000		Half upon engagement; Half upon conclusion	Educational Seminars/Workshops
Subscription Fee (Newsletters)	\$0		N/A	N/A
Commissions to the Adviser	\$0		N/A	N/A
Performance-based Fee	\$0		N/A	N/A
Fees Charged by Third Parties	Fee Amount		Frequency Fee is Charged	Services
Third Party Money Manager (First Ascent Asset Management)	Under \$3,000,000	0.35% annually; \$1400 per Household max	Quarterly in advance	Portfolio management for individuals and small biz
	Over \$3,000,000	Negotiable		
Fee Total 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	Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	Custodian	Model Marketplace	Yes	Altruist, LLC
Commissions	Yes	Custodian	Mark-ups	No	n/a
Custodian Fees	Yes	Custodian	Mutual Fund/ETF Fees and Expenses	Yes	Mutual Fund Company