

Compass Planning Associates Inc

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 Compass Planning Associates Inc’s advisory services and fees. Fees are not 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	N/A	N/A
Hourly Fee	\$405/hr, Jennifer Lane, CFP ^(R) \$390/hr, Sarah Stamp, CFP ^(R) \$295/hr, Joshua Weiss, CFP ^(R) \$295/hr, Austin Hsu	Per Project or Hourly Engagement	Planning by the Project or by the Hour
Subscription Fee	\$0	N/A	N/A
Fixed Fee	Ranges from \$5,000 to \$15,000	Quarterly in Arrears	Planning by the Year (Portfolio Management and Planning Services)
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	N/A	N/A	N/A
Robo-Adviser Fee	N/A	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	Account Custodian
Commissions	Yes	Account Custodian
Custodian Fees	Yes	Account Custodian
Mark-ups	Yes	Account Custodian
Mutual Fund/ETF Fees and Expenses	Yes	Mutual Fund/ETF Company and Investment Managers

Effective 01/08/2024